EDExpress for Windows
Release 1.0

Setup
Application Processing
Packaging
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Introduction to EDExpress for Windows

Using EDExpress for Windows 2018-2019, Release 1.0

EDExpress for Windows 2018-2019, Release 1.0 includes the App Express and Packaging modules for the 2018-2019 cycle, as well as Global functionality applicable across the software.

With the App Express module, you can import, review, and print Institutional Student Information Records (ISIRs) sent to you by the Central Processing System (CPS). ISIRs are generated when:

- Students file the Free Application for Federal Student Aid (FAFSA®)
- Students correct the Student Aid Report (SAR)
- You complete FAFSAs for students using FAA Access to CPS Online
- You make corrections to student records using FAA Access to CPS Online
- The CPS creates new ISIRs based on changes to student eligibility (“pushed ISIRs”)

The FAFSA and Student Inquiry tabs in the App Express module are linked directly to the FAA Access to CPS Online Web site. FAFSAs and ISIR correction data are submitted through the Web interface directly to the CPS.

Installation of the Packaging module is optional. With the Packaging module, you can track, award, and manage federal student aid funds.

Purpose of this Desk Reference

This desk reference provides basic instructions for using Global functions, the App Express and Packaging modules of EDExpress, and Financial Aid Shopping Sheet functionality. For additional information, see Help within EDExpress.
Technical Notes

The EDExpress database is password-protected to prevent unauthorized people from opening it in Microsoft Access and viewing information protected by the Privacy Act of 1974, as amended. If you need to open the database in Microsoft Access, contact CPS/SAIG Technical Support for the database password (see the Getting Help section later in this document for CPS/SAIG Technical Support contact information). However, Federal Student Aid strongly discourages users from viewing or manipulating any EDESuite software database using Microsoft Access. Making changes to the software database (using any version of Microsoft Access) can potentially cause damage to the database structure and proper software functionality and limit CPS/SAIG Technical Support’s ability to resolve problems you may encounter as a result.

For compliance with Section 508 of the Rehabilitation Act, all required fields highlighted in yellow display an “-R” at the end of the field label. Fields that turn blue when the value is changed display a “-C” at the end of the field label when the change is saved.

For further technical guidance, including information on minimal and optimal system requirements, see the *EDExpress 2018-2019 Installation Guide*, which is available for download from the U.S. Department of Education’s Federal Student Aid Download (FSAdownload) Web site, located at [fsadownload.ed.gov](http://fsadownload.ed.gov).
EDExpress 2018-2019 Redesign

We redesigned the EDExpress software for 2018-2019 to implement new software enhancements that improve usability, increase security, and eliminate outdated functionality. These enhancements, which are described throughout this desk reference, include:

- The EDExpress Desktop, which provides a multi-paned, dynamically updated view of key information and quick access to frequently used functions from the software’s main screen.

- Reinforced security setup options and password requirements that help keep your EDExpress database and your student data more secure.

- The ability to apply password protection to external export files and any documents printed from EDExpress to an external file.

- The use of Adobe PDF (Portable Document Format) for all print options.

- Automatic archival, compression, and encryption of imported data files in a secure, easily accessible format.

- The ability to resize, minimize, and maximize window and desktop pane sizes within EDExpress.

- Updated all date-related entry fields to standardize entry in MMDDCCYY format.

- Deleted functionality, fields, message classes, and other references to outdated or defunct programs, reports, and other features no longer in use.
Setting Up EDExpress

Logging In for the First Time

When you start EDExpress for the first time, you are required to create a new password for the SYSADMIN user ID.

To log in to EDExpress for the first time:


2. Type SYSADMIN for the user ID. Until you create a user ID for yourself or user IDs for others in your office, SYSADMIN is the default user ID.

3. Type System Admin for the password. Be sure to include the space between System and Admin (the two parts of the default password).

4. Type a new password in the New Password field. You must change the SYSADMIN password the first time you log in to the software. The new password becomes the password for the SYSADMIN user ID.

   Beginning with EDExpress 2018-2019, Release 1.0, new passwords must be a minimum of 12 characters and must include at least one uppercase letter, one lowercase letter, one number, and one keyboard character that is not a letter or number (such as an exclamation mark or other punctuation symbol).

   Note: You can adjust the minimum password length and other requirements later in the new Password Setup dialog box (Tools, Setup, Global, Password Setup). Your ability to adjust password requirements is subject to Federal Student Aid’s minimum password standards in EDExpress (for example, passwords must always be at least 12 characters in length).

5. Type the new password again in the Verify Password field.

6. Click OK or press Enter to log in to EDExpress. The EDExpress Desktop appears.
Important Notes

- **New for 2018-2019!** We now limit the access of the SYSADMIN user ID to specific administrative functions. To access other EDExpress functionality, you must establish a new user ID with the appropriate access level and log into the software using that user ID. See the “Defining Security” section later in this desk reference for more information.

- **New for 2018-2019!** After you log into EDExpress for the first time, the Startup Information pane appears with an alert that your assumed school is not defined. After you have created and logged in with a new user ID (other than SYSADMIN) with access to Global setup and defined your assumed school code in School setup (Tools, Setup, Global, School), this alert no longer appears. Under certain conditions, other warnings or alerts may appear in this desktop pane, some of which you can remove by clicking the Suppress button under the message.

- If you are a Direct Loan school and have both an application processing school code and a DL code, be sure to use your application processing school code as the assumed school.
The EDExpress Desktop

New for 2018-2019! The EDExpress Desktop is a new navigation tool for 2018-2019, providing quick and easy access to frequently used functionality and critical information in a multi-pane format. Pending imports and queries can be accessed directly from the desktop. The Startup Information pane displays warning messages and other information that used to appear after logging in to EDExpress. The Favorites pane provides quick access to print functionality for the documents you generate most often in EDExpress. Also included on the desktop is an RSS Feed with links to new and updated documents in What's New on IFAP, the IFAP calendar, or the latest IFAP podcasts.

Using the EDExpress Desktop is optional; you can show or hide the desktop by selecting or clearing the Show Desktop checkbox in the Desktop Settings dialog box (View, Desktop Settings). The familiar EDExpress menu bar is available whether the desktop is displayed or not. Desktop settings are specific to your EDExpress user ID.

See the sub-sections below for more information on settings and specific panes of the new EDExpress desktop.

Startup Information Pane

The Startup Information pane of the new EDExpress desktop replaces the Startup Information dialog box that appeared in prior versions of EDExpress after logging into the software. The Startup Information pane displays informational messages regarding key EDExpress functionality, warnings about potential issues you might encounter, and alerts to errors and critical problems affecting your ability to start or use the software.

For example, EDExpress might display a message in this pane to alert you that your disk space is low or, if you are starting EDExpress for the first time, remind you that your assumed school code has not been defined.

Some warnings and error messages can be cleared from the pane by clicking the Suppress button under the message text. For other messages, the pane displays an Update button you can click to access the software area related to the message and resolve the issue it describes.

Note: EDExpress displays critical alerts as pop-up messages outside of the Startup Information pane if you suppress the display of the EDExpress desktop.

Favorites Pane

The Favorites pane of the new EDExpress Desktop provides you with a quick shortcut to print functionality for the reports, lists, letters, and other documents you generate frequently in EDExpress.

To designate EDExpress reports you print frequently as “favorites,” click the star icon to the right of the report type in the Print dialog box. Reports marked as favorites appear automatically in the Favorites pane of the EDExpress desktop. To remove the designation of a report as a favorite, return to the Print dialog box for the report and click the star icon again. If you want to
remove all reports designated as favorites from the EDExpress desktop, go to View, Desktop Settings and click Clear Favorites.

**Pending Imports Pane**

The Pending Imports pane of the new EDExpress Desktop lists data files in your import data directory that have yet to be imported into EDExpress, as well as import types you can perform, such as prior year import and ISIR import into the Packaging module. You can choose to import or suppress each file or import type displayed in the pane by clicking the corresponding button.

If you click the import button, EDExpress opens the appropriate import dialog box for the module associated with the file or import type. You can then designate additional import options and settings and initiate the import process.

If you choose to suppress a specific data file or import type in the Pending Imports pane, EDExpress filters all future files with the same message class or the specified import type from the pane. You can clear these suppressions in the desktop settings (View, Desktop Settings). Suppression settings are specific to your User ID and do not affect your ability to locate or import files directly from the import dialog boxes of EDExpress modules.

**Note:** If your import data directory is located on a network and multiple EDExpress users in your office routinely import data files, note that the files listed in Pending Imports section change dynamically with each refresh of the desktop to remove files from the list that have been imported by you or another user. Use the desktop settings (View, Desktop Settings) to adjust the refresh rate for the Pending Imports pane and other desktop panes.

**Note:** The security group associated with your user ID in EDExpress Security Users setup (Tools, Setup, Global, Security Users) must have access to import functionality to use the Pending Imports pane.

**Note:** If you have configured EDconnect to download files automatically to your default import directory, new files available for import into EDExpress will refresh automatically in this pane as they are added to your default import directory.

**Queries Pane**

The Queries pane of the new EDExpress Desktop enables you to select module-specific predefined or custom queries from Query setup, view the current number of student records in your database meeting each query’s criteria, and quickly access software functions for the records where applicable, such as opening the records as a group or initiating the multiple entry or browse dialog boxes. Query results display in the pane and refresh both at regular intervals and upon each new startup of the software. As results update, you can use the incoming information to identify database records requiring further attention, and to drive your office’s workflows.
The queries you select for the Queries pane must already exist in Query setup (Tools, Query). To add a query to the Queries pane, click the Settings button in the top right corner of the pane to access the Query Settings dialog box. In the Query Settings dialog box, select the applicable module, record type, and title for the query (from Query setup), then confirm or modify the custom title for the query that will display in the Queries pane. If you select a parameter query, you must also click the Parameter button to specify the desired value range.

After adding a query to the Queries pane, the Count column displays the current number of records in your database that meet the query criteria. The record count is updated dynamically by EDExpress based on the refresh rate you select in the desktop settings (View, Desktop Settings). The record count is also affected by the record type you select in Query Settings. If EDExpress determines that at least one record in your database meets the query criteria, you can click Open under the query row to open the qualifying records, similar to selecting a query in the Student Search toolbar function. After EDExpress opens the records, you can use the left and right arrow keys in the toolbar to navigate between student records. You can also click the Multiple Entry and Browse buttons to update or view the records meeting the query criteria. The Multiple Entry button does not appear for App Express queries, as that module does not have a multiple entry function.

Note: If you access Multiple Entry from a query in the Queries pane, the criteria for the Multiple Entry function is limited automatically to the records meeting the query you selected in the pane. The Selection Criteria and SSN File buttons are disabled. To use different selection criteria for the Multiple Entry function, click Cancel on the Multiple Entry dialog box and access the Multiple Entry function from the Process menu.

If you want to remove a specific query from your Queries pane, locate the query in the Query settings dialog box and click the Delete button (this action only removes the query from the pane – the query remains available for use in selection criteria for specific EDExpress functionality). If you want to clear all queries from the Queries pane, click Clear Queries in desktop settings (View, Desktop Settings).

Note: The security group associated with your user ID in EDExpress Security Users setup (Tools, Setup, Global, Security Users) must have access to opening student records, using multiple entry, and browsing records for associated buttons to appear under applicable queries in the pane.

For more information, see the “Using the EDExpress Desktop Queries Pane” section later in this desk reference.

**RSS Feed Pane**

The RSS Feed pane of the new EDExpress Desktop enables you to display links to current information from Federal Student Aid’s Information for Financial Aid Professionals (IFAP) Web site. Click the Settings button in the top right corner of the pane to access the RSS Feed Settings dialog box, where you can indicate whether you want the RSS Feed pane to display links to What’s New items from IFAP home page, calendar items from the site, or IFAP
podcasts. The title of the pane changes dynamically based on the IFAP RSS feed option you select in settings.

The information displayed in the RSS Feed pane is updated dynamically by EDExpress based on the refresh rate you select in the desktop settings (View, Desktop Settings).

If you do not want the EDExpress desktop to display the RSS Feed pane, clear the Show RSS Feed checkbox in desktop settings (View, Desktop Settings).

**Desktop Settings**

Use the Desktop Settings dialog box (View, Desktop Settings) to show or hide the EDExpress Desktop. If you want to show the desktop, set your refresh rate and RSS Feed preferences here. You can also use this dialog box to clear desktop suppressions of items from the Startup Information and Pending Imports pane, clear print favorites, or clear the Queries pane. You must click **OK** for changes you make in this dialog box to apply.
**Prior Year Import**

After you log in to EDExpress 2018-2019 for the first time with a user ID other than SYSADMIN, the Pending Imports pane of the EDExpress Desktop displays an option to import Prior Year User-Defined Queries, Setup, and File Formats from the EDExpress 2017-2018 database. You can click the **Import** button in the Pending Imports pane under the prior year import item to access the Global import dialog box, review prior year import options, and initiate the import.

If you prefer not to import prior year data using the link in the Pending Imports pane, you can initiate the import later by following the steps at the end of this section. You can also click the **Suppress** button under the prior year import option in the Pending Imports pane to clear the import type from the pane. Suppression of import types from the Pending Imports pane is specific to your user ID.

The following data can be imported using Prior Year User-Defined Queries, Setup, and File Formats:

**Query**
- Global
- App Express
- Packaging

**Global Setup**
- Security Groups
  - **Note:** Security group access rights are not transferred when you import prior year Security Groups. You must reassign access rights to imported groups in Security Groups setup. See “Defining Security Groups” in this desk reference for more information.
- Document Tracking
- User-Defined Letter Text
- System
- File Management
  - **Note:** Import and export file paths for new message classes default to C:\IAM\DATA and are not updated when you import prior year File Management setup. If you want the import and export paths for new message classes to be different than the default C:\IAM\DATA, you must change the paths in File Management setup.
- File Formats
  - **Note:** If a file format with the same code already exists in EDExpress 2018-2019, the file format from the prior cycle is not imported.
• User Database
• FAA Access
• Financial Aid Shopping Sheet Profiles

**Application Processing Setup**

• System
• File Formats

**Note:** If a file format with the same code already exists in EDExpress 2018-2019, the file format from the prior cycle is not imported.

**Packaging Setup**

• Academic Year Profiles
• Fund Maintenance
• Award Methodologies
• Budgets
• SAP Values
• System
• User-Defined Formulas
• File Formats

**Note:** If a file format with the same code already exists in EDExpress 2018-2019, the file format from the prior cycle is not imported.

*To import prior year data:*

1. Select File, Import from the menu bar, then choose the Global tab.
2. Confirm that Prior Year User-Defined Queries, Setup, and File Formats appears as the Import Type.
3. Select Printer, File, or Screen as the output destination. If you want to send the report to a file, click the File button and type a name for the file, then click Save.
   
   If you chose File as your output destination, no paper copy is printed (the information is printed to the file in PDF format). To print a paper copy, locate the file, open it using a PDF-compatible program such as Adobe Reader, and print it. You can also password-protect import reports printed to a file by entering a password in the Password and Verify Password fields. The printed file is encrypted in PDF format.
4. Click OK. The Prior Year Move dialog box appears.
5. Select the items you do not want to import by clearing the checkboxes in the Import column.
6. Select one of the following import options:
   - **Import All records for Setup Options Selected** imports all records without prompting you to select specific records.
   - **Import only Specific records for Setup Options Selected** prompts you to select the specific records you want to import for each group of records, such as Security Groups and Award Methodologies.

7. Click **OK**.

   If you chose Import All records for Setup Options Selected, the In Progress dialog box appears.

   If you chose Import only Specific records for Setup Options Selected, you must select the specific records you want to import for each group of records before the In Progress dialog box appears.

8. Click **OK** to close the In Progress dialog box.

9. If you selected Printer as the output destination, click **OK** to print the Import Prior Year Queries, Setup, and File Formats report.

**Important Notes**

- **New for 2018-2019!** Due to changes in minimum password requirements, user IDs and passwords established in your EDExpress 2017-2018 Security Users setup are not pulled forward to EDExpress 2018-2019. You must recreate all user IDs and passwords in EDExpress 2018-2019 based on the default or custom settings defined in the new Password Setup dialog box (**Tools, Setup, Global, Password Setup**).

  The prior year import option for Security Users setup will be restored in EDExpress 2019-2020.

- When you import prior year file formats, all file format fields are imported, even those that include fields for which labels have changed, as long as the fields exist in the current year’s software.
What Is Global?

The Global module, which is installed automatically, provides core features and functionality applicable across EDExpress and available in all of its other modules. In addition to storing student demographic records and establishing default EDExpress settings, the Global module allows you to:

- Define minimum requirements for user passwords
- Create security groups and security users
- Import prior year user-defined queries, setup, and file management; prior year demographic data; prior year user data; user-defined data; demographic data, and ED initiated imports
- Create and view demographic data
- Export external demographic data to use in spreadsheets or with external systems
- Create notes on individual student records
- Print labels, notes, letters, lists, queries, user data, setup options, record layouts, and student summaries
- Manage import and export directories
- Create user-defined fields
- Track documents
- Set up, create, print, and export the Financial Aid Shopping Sheet for your students (see appendix)

In addition, the Global module provides two database utilities, Compact and Repair Database and Verify Database.
Global Setup

Defining Security Groups

Creating security groups is optional. If you do not need to limit access to EDExpress, you can create user IDs and assign them to the predefined EXPRESS ADMINISTRATION security group, which has access to all EDExpress functions.

If you need to restrict access to some of the functions within EDExpress for certain users, the first step is to establish groups that have limited access to EDExpress. The second step is to create user IDs and assign them to the groups you have created to specify which functions the users can access.

You can grant or restrict access to FAA Access setup when you create security groups. Click the Global tab on the Security Groups dialog box and select or clear the checkbox in the Access column to the right of the FAA Access function under SETUP.

To create a security group:

1. Select Tools, Setup from the menu bar, then choose Global, Security Groups.
2. Click Add.
3. Type the name of the group you are defining.
4. Select the Browse Only (Tabs)? checkbox if you want the group to have read-only access to the tabs on individual student records. Access to other functions, such as importing, exporting, and using Multiple Entry, can be limited by clearing the Access checkboxes.
5. Click the tab for the module for which you are defining security. The security options change depending on the tab you select.
6. Select the checkboxes in the Access column to enable or disable the functions to which the group will have access. If the function’s checkbox is selected, the function is enabled. For example, if you want users in a group to have access to Global setup options, click the Global tab, scroll down to the checkbox for Setup in the Tools group, and select the checkbox to enable access.
7. Click Save to add the group to the database.
8. (Optional) Repeat steps 2 through 7 to add more groups.
9. Click OK to return to the EDExpress main screen.
Defining Password Security

New for 2018-2019! The new Password Setup feature enables you to establish default parameters and requirements for passwords you define in Security Users setup (Tools, Setup, Global, Security Users). The new password settings include minimum password length, minimum and maximum password age (measured in days), and password history length (measured in number of password resets). You can also test passwords in this dialog box to ensure they meet the parameters and requirements you define.

Prior to establishing new user IDs and passwords in Security Users setup, we recommend you review the Password Setup dialog box with your technical staff and determine which default parameters and requirements you want to adjust for EDExpress users at your school. You should consider how often you want your staff to change their passwords (minimum/maximum password age), how frequently they can re-use the same password (password history length), and the minimum length for each new password.

In addition to the password parameters you establish in Password Setup, valid EDExpress passwords must contain at least one uppercase letter, one lowercase letter, one number, and one keyboard character that is not a letter or number (such as an exclamation mark or other punctuation symbol).

To modify password requirements:

1. Select Tools, Setup from the menu bar, then choose Global, Password Setup.

2. Increase or decrease the Minimum Password Length field if you want to adjust the minimum required length for passwords associated with EDExpress user IDs. User ID passwords established in Security Users setup (Tools, Setup, Global, Security Users) must be a minimum of 12 characters in length. Valid values are 12 (the default) to 50.

3. Increase or decrease the Password History Length if you want to adjust the maximum number of password resets that must elapse before an EDExpress user can reuse a password. EDExpress requires a minimum of 24 password resets before allowing a password to be reused. Valid values are 24 (the default) to 90.

4. Increase or decrease the Minimum Password Age and Maximum Password Age fields if you want to adjust the number of days that must elapse after a password change for an EDExpress user ID before the user is required to change his or her password. EDExpress requires that updated user ID passwords be used for a minimum of 5 days before you can require that they be reset. Valid values for both fields are 5 (the default) to 90.

5. (Optional) Use the Sample Password field to test entry of passwords to ensure they meet the requirements you’ve established.

6. Click OK to confirm and apply any changes you have made.
Defining Security Users

To create users:

1. Select Tools, Setup from the menu bar, then choose Global, Security Users.
2. Click Add (below the record count box). If this is your first record to add after installing EDExpress, skip this step and go to step 3.
3. Type a user ID in the User ID field and press Tab.
4. Click the down arrow to view a list of available security groups and select a group name. The security settings for this group are applied to the user ID you are creating.
5. (Optional) Select the Export to EDconnect? checkbox to export records to the EDconnect transmission queue automatically so they can be sent to the Common Origination and Disbursement (COD) System for processing.
6. (Optional) Select the Automatically Transmit? checkbox if you want EDExpress to start EDConnect and automatically transmit your files when you export them.
7. Press Tab to advance to the Password field.
8. Type the password for the user in the Password field. In addition to the password parameters you establish in Password Setup (see prior section), valid EDExpress passwords must be a minimum of 12 characters and must contain at least one uppercase letter, one lowercase letter, one number, and one keyboard character that is not a letter or number (such as an exclamation mark or other punctuation symbol). Press Tab.
9. Type the password again in the Verify Password field.
10. Click Save to add the user to the database.
11. (Optional) Repeat steps 2 through 10 to add more user IDs.
12. Click OK to return to the EDExpress main screen.

Important Notes

- You can also change passwords in the Security Users dialog box. See Help for instructions on changing passwords.
- When you create a new user ID, EDExpress automatically creates a profile of default settings for the user ID in Global System Setup (Tools, Setup, Global, System). See “Global System Setup” later in this section for guidance on customizing these settings.

School Setup

To define an assumed school:

1. Select Tools, Setup from the menu bar, then choose Global, School.
   
   **Note:** To define your assumed school, you must be logged in with a user ID other than SYSADMIN that has access to Global Setup.
2. If you receive the message “No Assumed School,” click OK.

3. Click Retrieve... (above the Help button in the lower portion of the dialog box) to view the school list. Right-click any column heading to view a menu of sorting functions to help you locate your school. You can also use the scroll bars to view the list.

4. Click your school’s name and click OK. If the Federal School Code that now appears in the School Code field is the one you want for your assumed school, select the Assumed School checkbox. Verify that the information about your school is correct, and make changes if necessary.

5. If you will be processing applications, confirm that the App Processing Participant checkbox is selected.

6. Click OK to continue.

7. Click Yes to save.

**Important Note**
- If you are a Direct Loan school and have both an application processing school code and a DL code, be sure to use your application processing school code as the assumed school.

**Global System Setup**

When you create a new user ID in Security Users setup, EDExpress automatically creates a profile of default settings for the user ID in Global System Setup. By default, new Global System Setup profiles match the settings and options selected for the SYSADMIN ID. With one exception, these settings can be customized by EDExpress users to match their personal preferences and priorities.

**To modify Global System Setup values for an individual user ID:**

**Note:** Options that cannot be selected for individual users are disabled.

1. Select Tools, Setup from the menu bar, then choose Global, System.

2. Click the ellipsis (...) button to the right of the User ID field in the upper portion of the dialog box and select a user ID from the list of users. Click OK.

3. (SYSADMIN only) Select the Allow notepad entries to be edited? checkbox if you want EDExpress users to create and edit Notes entries. If you clear this checkbox, users will have read-only access to Notes entries.

4. Click the down arrow and select the default system (Global, Application Processing, or Packaging) to display when the user prints, imports, exports, deletes, creates queries, and creates file formats.

After you install EDExpress 2108-2019, Release 2.0, you can modify this setting if the user prefers to have the Pell, Direct Loan, or TEACH Grant module as the default system.
5. Select the **Return to Dialog** checkbox if the user wants to return to the Print, Import, or Export dialog boxes after printing a report, importing data, or exporting data.

6. Click the down arrow and select **Single** if the user usually prints a single record at a time, or select **Multiple** if the user usually prints multiple records at a time.

You can change this setting in the Print dialog box for a specific print job at any time, but the default setting remains the same until you change it in Global System setup.

7. Click the down arrow and select **Printer, File, Screen, or E-mail** as the default report file destination. You can change this setting in the Print dialog box for a specific print job at any time, but the default setting remains the same until you change it in Global System setup.

8. Click the down arrow and select **E-mail Address 1** if the user wants all correspondence that can be printed to e-mail, such as award letters and document tracking letters, to be sent to the e-mail address in the E-mail Address 1 field on the Demo tab. Select **E-mail Address 2** if the user wants e-mailed reports to be sent to the e-mail address in the E-mail Address 2 field on the Demo tab.

You can change this setting in the Print dialog box for a specific print job at any time, but the default setting remains the same until you change it in Global System setup.

9. Click the down arrow and select **Permanen**t if the user wants all correspondence to be addressed to a student’s permanent home address. Select **Local** if the user wants all correspondence to be addressed to a student’s local address.

You can change this setting in the Print dialog box for a specific print job at any time, but the default setting remains the same until you change it in Global System setup.

10. Click **OK** to continue.

11. Click **Yes** to save.

**FAA Access Setup**

If you are the destination point administrator (DPA) of the TG number used for CPS processing, or if the DPA has enrolled you as a user for FAA Access to CPS Online, you can enter your EDEExpress FAA Access authentication information (TG number, Federal School Code, and Application Save/Restore Password) in the FAA Access setup dialog box. This information will be automatically filled on the FAA Access Automation Information dialog box when you use the FAA Access interface from the menu bar, the FAFSA tab, or the Student Inquiry tab.

EDEExpress uses ED’s authentication process for logging into FAA Access to CPS Online through EDEExpress. You must provide your FSA User ID and password each time you connect to FAA Access to CPS Online through EDEExpress. If you do not already have an FSA User ID, contact CPS/SAIG Technical Support at 800/330-5947 or by e-mail at CPSSAIG@ed.gov for help obtaining one.

The same FAA Access authentication information you enter in Setup will log you in to the Return of Title IV Funds on the Web site. To access the site, select **View, FAA Access to CPS Online** from the menu bar, then select **Return of Title IV Funds on the Web**.
Note: Although access to the Return of Title IV Funds on the Web site is part of FAA Access to CPS Online enrollment, it is not automatically granted to people who are enrolled for FAA Access to CPS Online and must be specifically requested by your DPA on the Student Aid Internet Gateway (SAIG) Enrollment Web site located at fsawebenroll.ed.gov. Contact your DPA if you are unsure whether or not you have been enrolled for the service.

1. Select Tools, Setup from the menu bar, then choose Global, FAA Access.
2. Type the TG number you use for FAA Access to CPS Online in the TG # field.
3. Type your Federal School Code in the School Code field. Or, click the ellipsis (...) button to select your school code from the list of codes.
4. (Optional) Type a password for saving and restoring applications and corrections in the Application Save/Restore Password field.
   Note: The Application Save/Restore Password is the password you use to access any incomplete FAFSAs you save to FAA Access to CPS Online. The password must have at least four characters but not more than eight. Valid values are uppercase letters (A-Z), lowercase letters (a-z), and numbers (0-9). If you do not enter a password in Setup, you must enter a password in the FAA Access authentication information dialog box to save an unfinished FAFSA and use the password later to restore the FAFSA so you can continue working on it. You cannot restore a FAFSA that you have not saved. An incomplete FAFSA is saved for 45 days after you last accessed it.
5. Click OK to continue.
6. Click Yes to save.

Important Notes

• New for 2018-2019! We updated EDExpress to open the FAA Access to CPS Online Web site in a browser window outside the software when accessed from the View menu outside student records.
• Beginning with 2018-2019 startup in October 2017, you need Internet Explorer 11 or higher to access FAA Access to CPS Online.
• FAA Access setup is disabled for the SYSADMIN user ID, so be sure to log in with a user ID other than SYSADMIN if you want to set up FAA Access for a specific user. Although you can use FAA Access to CPS Online when logged in with SYSADMIN, EDExpress does not store FAA Access user information for the SYSADMIN user ID.
• You can set up FAA Access only for the user ID with which you logged in, so be sure to log in with your own user ID before setting up FAA Access.
File Management

Use File Management to tell EDExpress where to look for files you want to import and where to put files you export. For example, if you use EDconnect to send and receive your files, the Export and Import directories in EDExpress should match the Send and Receive directories in EDconnect.

Follow the steps below for the Export and Import tabs in the File Management dialog box.

To set paths for import and export files:
1. Select Tools, Setup from the menu bar, then choose Global.
2. Click File Management.
3. Click the Default Export Directory or Default Import Directory tab. This dialog box enables you to change the directory location of your export or import files.
4. Click the Default Export Directory or Default Import Directory button to locate and select a different directory for all export or import files.
5. Click the ellipsis (…) button to the right of the File Path column to locate and select different directories for individual message classes.
6. Click OK.

Important Notes
- New for 2018-2019! The EDExpress import process now archives imported data files automatically, storing the files in a compressed, password-protected ZIP file called Backup#.zip (where # is a number from 0-9 that is incremented each time the previous numbered backup file reaches 2 gigabytes or more in size). Archive files are stored in your default import data directory (as specified in File Management setup) and are accessible from the import dialog box by clicking the Archived File button. Archived files for the import type you selected are listed in folders organized by import date.
- New for 2018-2019! The default import directory location you define in File Management setup is used as the source for available import files and import types in the Pending Imports pane of the new EDExpress Desktop. If your default import data directory is located on a network and multiple EDExpress users in your office routinely import data files, note that the files listed in Pending Imports section change dynamically with each refresh of the desktop to remove files from the list that have been imported by you or another user.

Document Tracking Setup

To satisfy documentation requirements and meet school information needs, applicants must provide documents to the financial aid administrator to complete the application process. These documents can include tax returns for verification or a school aid application. EDExpress can track the request and receipt of these required documents. You can define as many tracking documents as may be required of your applicants. You can also mark each document as:
• **Automatic Request?** Use this option if you want EDExpress to assign this document automatically during the Add Documents process. EDExpress assigns documents according to the criteria you have specified. If criteria or comment codes are attached, EDExpress adds the document only to the students who meet the criteria.

• **Required to Package?** If you select this option, the document must be recorded as received before the student’s aid can be packaged. If the record is already packaged, you cannot add a document that is required for packaging.

• **Required for Verification?** Your school requires this document for verification. Use this option if you want the document assigned to students selected for verification during the Add Documents process. EDExpress adds the document only when the Verification Status Code field on the demographic record is not equal to N. If you enable this checkbox, using the Automatic Request option is unnecessary, because EDExpress requests this document automatically from any student selected for verification.

**To set up Document Tracking:**
1. Select **Tools, Setup** from the menu bar, then choose **Global**.
2. Click **Document Tracking**.
3. Type a **Code** and a **Description** for the document tracking record.
4. Click **OK**.

**Important Note**
- To add documents to the records in your database, select **Process, Add Documents** from the menu bar. EDExpress automatically assigns the documents according to the criteria you established for each document when you set up Document Tracking.

**ED Initiated Imports Setup**
ED reserves 25 message classes each award year, such as ED2518OP, to deliver additional information to you through the SAIG. When you receive a file in one of these message classes, follow the steps below to define the message class. EDExpress adds the report name to the Import Type list in the Global tab of the Import dialog box.

**To set up ED-Initiated Imports:**
1. Select **Tools, Setup, Global** from the menu bar.
2. Click **ED Initiated Imports**, then click the **Message Class** field.
3. Click the **down** arrow and select the message class you are defining.
4. Type the report name provided by ED.
5. (Optional) Press **Enter** or click **Add** to add another import.
6. Click **OK**, then **Yes** to return to the EDExpress main window when you are finished defining message classes.
**Set Up a User Database**

EDExpress enables you to add your own fields to the database. These fields appear on the student’s record and can be used in developing queries. You can create up to 200 user-defined fields in your database.

**Note:** To change a user-defined field, you must delete it and recreate it. You cannot modify user-defined fields.

You can fill user-defined data fields manually by opening a student’s record, selecting the User Data tab, and entering the data, or automatically by using Multiple Entry. You can also use a Global external import file to add user-defined data fields.

**To set up a user-defined database:**

1. Select **Tools, Setup** from the menu bar, then choose **Global, User Database**.
2. Click **OK**.
3. Enter the following values for each field you want to add to your database:

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Field</td>
<td>The name of the field. You can use up to 20 characters.</td>
</tr>
<tr>
<td>Type</td>
<td>The type of data used in the field. Click the down arrow to display a list of types.</td>
</tr>
<tr>
<td>Length</td>
<td>The length of the data:</td>
</tr>
<tr>
<td>Date:</td>
<td>8</td>
</tr>
<tr>
<td>Numeric:</td>
<td>1-11</td>
</tr>
<tr>
<td>Text:</td>
<td>1-40</td>
</tr>
<tr>
<td>Yes or No:</td>
<td>1</td>
</tr>
<tr>
<td>Description</td>
<td>A description of the field. You can use up to 50 characters.</td>
</tr>
</tbody>
</table>

4. Press **Enter** or click **Add** to add additional fields.
5. When you are finished adding fields, click **OK** to continue.
6. Click **Yes** to save.

**Create User-Defined User Letter Text**

EDExpress enables you to create user-defined text for letters you routinely send to students. You can create as many letters as you need. Letters are formatted so that when the letter is folded, the student’s address appears in the window of a #10 window envelope.

**To create User-Defined User Letter Text:**

1. Select **Tools, Setup** from the menu bar, then choose **Global**.
2. Choose **User-Defined User Letter Text** to create your text.
3. Enter your text (up to 42 lines) and a title. You can associate the letter with a specific module.
Create User-Defined Award Letter Text

EDExpress enables you to create text for award letters. You can create as many letters as you need. Letters are formatted so that when the letter is folded, the student’s address appears in the window of a #10 window envelope.

To create User-Defined Award Letter Text:
1. Select Tools, Setup from the menu bar, then choose Global.
2. Choose User-Defined Award Letter Text.
3. Enter your text (up to 12 lines) and choose whether or not to include a greeting with the student’s name. If you include a greeting, we suggest you allow an extra space between the greeting and the text.
4. Click OK to continue.
5. Click Yes to save.

Create User-Defined Document Tracking Letter Text

EDExpress enables you to create text for document tracking letters. You can create as many letters as you need. Letters are formatted so that when the letter is folded, the student’s address appears in the window of a #10 window envelope.

To create User-Defined Document Tracking Letter Text:
1. Select Tools, Setup from the menu bar, then choose Global.
3. Enter your text (up to 14 lines) and choose whether or not to include a greeting with the student’s name. You can also choose to modify the preset text in text blocks 2 and 3.
4. Click OK to continue.
5. Click Yes to save.
Opening Student Records

EDExpress offers multiple methods for opening single or multiple student records using toolbar features such as Student Search, which are available from the EDExpress main screen as well as within student records. You can also open student records meeting query criteria from the Queries pane of the EDExpress Desktop.

If you select **File, Open** from the menu bar or press Ctrl-O to initiate opening a record, EDExpress places the cursor in the entry field to the left of the **Find** button in the toolbar.

**To search for a single student record by name or SSN using the Find feature:**

1. Click the down arrow at the far right of the toolbar. If **Auto Detect** is selected, you can search by either student name or SSN in the Find entry box. If you prefer to search only by student name or SSN, select **Student Name** or **Social Security Number** in the dropdown menu. We recommend keeping the value set to Auto Detect for better flexibility.

2. In the Find entry box, enter the student’s full SSN (without hyphens) or the student’s full or partial name. If you are searching on name, you can enter just the last name or just the first name and last name, you can enter the last name, first name, and middle initial (with the last and first name separated by a comma), or you can enter the first name, middle initial, and last name without commas. For example, if you are searching for John A Smith, you can enter **Smith** or **John Smith** or **Smith, John A** or **John A Smith**. Do not enter a period after the middle initial. Also, if the first or last name is more than one word and includes spaces, enclose the entire first or last name in quotation marks.

3. Click the **Enter** key or the **Find** button next to the entry field to initiate your search.

4. If EDExpress locates the exact record you are searching for, the record opens.

5. If EDExpress locates multiple records matching your criteria, a Demographic Data dialog box displays listing matching records. Scroll through the grid, select the record you want to open, and double-click the record or click **OK** in the dialog box to open it.

**To open student records using the Student Search feature on the toolbar:**

- With Student Search selected in the dropdown menu, click the **ellipsis** (…) button to view a list of all demographic records in your database, from which you can select a record to open, **or**

- Click the down arrow next to the Student Search menu and select **ISIR** to view a list of all ISIR records in your database, from which you can select a record to open, **or**

- Click the down arrow next to the Student Search menu and select a query for the group of students you want to open. If you choose a parameter query, you are prompted to enter the values you want to search for, **or**

- If you want to run the last query you used to open student records, click the down arrow next to the Student Search menu and select **Last Search.**
If more than one student record meets the query criteria you use, EDExpress opens multiple student records. Use the left and right arrows on the toolbar to scroll through the records.

**To open student records from the EDExpress desktop’s Queries pane:**

1. Identify the query in the Queries pane that applies to the student records you want to open. To open student records using this feature, the **Count** value for the query must be at least 1. You can add existing queries to this pane by clicking the **Settings** button in the top right corner of the Queries pane.

2. Click the **Open** button under the Query title in the Queries pane.

EDExpress opens all of the records meeting the query. Use the left and right arrows on the toolbar to view the records you opened.
What Is App Express?

The App Express module enables you to create, correct, review, print, export, and import student financial aid records:

- Enter FAFSAs by selecting the FAFSA tab, which takes you to FAA Access to CPS Online where you can enter initial applications for students.
- Correct student records by selecting the Student Inquiry tab, which takes you to FAA Access to CPS Online where you can enter corrections to specific transactions.
- Import ISIRs into App Express, where you can compare data, review and print ISIR data, and generate reports.
- Review ISIRs on the ISIR Review tab, where you can view students’ ISIR data, print students’ active transactions, or compare the data on two transactions for a particular student.
- Use the Print dialog box to print a variety of lists, reports, and records from the App Express module, including ISIRs, NSLDS data, FISAP reports, List–Processed ISIRs, RL–User Defined Format, and Student Summary.
- Export student data to an ASCII file for use in spreadsheets or with external systems.

After you have imported ISIRs into App Express, you can import the accepted ISIRs into the TEACH Grant, Direct Loan and Pell modules to use for creating originations and disbursements and into the Packaging module to use for creating student aid packages.

Important Notes

- **New for 2018-2019!** Federal Student Aid is implementing changes to the definition of “youth” for 2018-2019 as it pertains to homelessness. Students who are older than 21, but not yet 24, and who are unaccompanied and homeless or self-supporting and at risk of being homeless, now qualify as independent students. Previously, applicants who were 22 or 23 could not self-identify on the FAFSA that they are homeless, at risk of being homeless, or in a homeless circumstance. We are revising the FAFSA, FAFSA on the Web, and system edits so that applicants who are 22 or 23 can also answer questions 56, 57, and 58 on the FAFSA. This change eliminates the need for FAAs to perform dependency overrides for these students. We also no longer make assumptions that an applicant is not homeless or not at risk of homelessness because they are over 21.
As a part of this overall effort, we removed the ISIR field Assumed Homeless Youth as Determined by HUD from all EDExpress Application Processing functionality.

- **New for 2018-2019!** We added student and parent IRS data field flags to the ISIR for 2018-2019 to assist schools and state agencies in more easily identifying student and parental financial information that was transferred to the FAFSA from the IRS Web site using the IRS Data Retrieval Tool (IRS DRT). The values for these fields indicate whether student or parent financial data was transferred from the IRS, as well as whether the data was subsequently modified. The new fields correspond to the student and parent versions of the IRA Distributions, Interest Income, IRA Payments, Untaxed Pensions, Type of Tax Return, Tax Return Filing Status, Exemptions, and Education Credits data transferred from the IRS. In EDExpress 2018-2019, the new data fields print on the ISIR, can be viewed on the FAA Information dialog box from the ISIR Review tab (View, FAA Information) and App Express Browse, and can be selected in queries and File Format setup.

- **New for 2018-2019!** We updated the valid values for the student and parent IRS Request Flag fields on the ISIR to include a new value indicating if the student or parent filed an amended tax return. If the IRS indicates a student or parent filed an amended tax return, the user is not allowed to submit corrections to IRS data in FAFSA on the Web and must contact an FAA for correction assistance. In EDExpress 2018-2019, the new student and parent IRS Request Flag values print on the ISIR, can be viewed on the FAA Information dialog box from the ISIR Review tab (View, FAA Information) and App Express Browse, and can be selected in queries and File Format setup.

- In certain circumstances, the ISIR import process updates the Student Eligibility Code field on the Demo tab, if blank, to match the HS Diploma or Equivalent value on the ISIR. For example, if the Student Eligibility Code is blank on the Demo tab and you import an ISIR with a HS Diploma or Equivalent value of 1 (High School Diploma), the Student Eligibility Code field on the Demo tab is updated to 06 (High School Diploma). The software also converts the HS Diploma or Equivalent value of 3 (Home Schooled) to Student Eligibility Code of 04 (Home Schooled) and the HS Diploma or Equivalent value of 2 (GED/State Equivalent Test) to Student Eligibility Code 07 (GED or State Authorized HS Equivalent Certificate).

If the ISIR import function does not update the Student Eligibility Code field, you must use manual entry, Global multiple entry, or the external origination add/change import options available in the Direct Loan, Pell Grant, and TEACH Grant modules to update the field before you can originate or save a loan or grant record for the student.

**Note:** See the **2018-2019 Common Origination and Disbursement (COD) Technical Reference**, Volume II, Sections 1 and 3, for the valid Student Eligibility Code values you should use for the Demo tab field in EDExpress 2018-2019.
• Public Law 112-141 eliminated the subsidy on Direct Subsidized loans when a new borrower’s enrollment time exceeds 150% of the published length of the longest program of study in which the borrower is enrolled. New borrowers are defined as any borrower without an outstanding loan balance on a Direct Subsidized, Direct Unsubsidized, PLUS loan (Parent PLUS and Grad PLUS), FFEL, consolidation and/or converted TEACH Grant on or after July 1, 2013. To assist COD in determining who qualifies as a new borrower, COD interfaces with NSLDS to determine if the student has an outstanding federal student loan balance.

To help you identify students affected by these regulations, the ISIR includes two NSLDS data elements, the Subsidized Usage Limit Applies flag and Subsidized Usage Period.

For the Subsidized Usage Limit Applies flag, valid values are:

- **Y** = Borrower is subject to the 150% Subsidized Usage Limit rules
- **N** = Borrower is not subject to the 150% Subsidized Usage Limit rules
- Blank

For Subsidized Usage Period, valid values are **000.000** to **999.000**, indicating usage periods by quarters of a year.

The Subsidized Usage Limit Applies flag and the Subsidized Usage Period appear in the NSLDS Financial Aid History section of the ISIR (View, NSLDS) and are printed on the NSLDS report.

In addition, the NSLDS Postscreening Reason Code of **25** identifies students with a change in the Subsidized Usage Limit Applies flag as a result of postscreening. You may also want to monitor ISIRs with an NSLDS Postscreening Reason Code of **26** (indicating a change in the student’s loan subsidy status) or **27** (indicating a decrease in the student’s Subsidized Usage Period). The NSLDS Postscreening Reason Code field appears in the NSLDS Financial Aid History section of the ISIR (View, NSLDS) and is printed on the NSLDS report.
App Express System Setup

To set up App Express System options that will be used when you import records:

1. Select Tools, Setup from the menu bar, then choose Application Processing, System.

2. Clear the Update Demographic Data? checkbox if you do not want EDExpress to update demographic records when you import ISIRs. EDExpress automatically updates the fields on a student’s demographic record (Demo tab) when you import a higher transaction than the one currently in the EDExpress database.

   Leave the Update Demographic Data? checkbox selected if you want EDExpress to update the fields on the student’s Demo tab when you import ISIRs. The demographic fields are updated only when a higher transaction number is imported.

   Note: Under normal circumstances, you should allow EDExpress to update demographic data.

3. Select the Compare Demographic Data? checkbox if you want EDExpress to print a list of changes made to demographic records during the ISIR import process as part of the Import Records Edit Report.

4. Click OK to continue.

5. Click Yes to save.
Importing and Printing ISIRs

Importing Data into EDExpress

Within three business days of entering FAFSA application data or ISIR corrections on the FAA Access to CPS Online Web site, the corresponding ISIRs are available for you to retrieve from your Student Aid Internet Gateway (SAIG) mailbox. See EDconnect Help or the SAIG Desk Reference for EDconnect at the U.S. Department of Education’s Federal Student Aid Download (FSAdownload) Web site, located at fsadownload.ed.gov, for more information. You must import the data into EDEexpress to view the ISIRs in EDExpress.

To import ISIRs into EDExpress:

1. If the ISIR file you want to import appears in the Pending Imports pane of the EDExpress Desktop, click the Import button under the file name and skip to step 5. Otherwise, select File, Import from the menu bar, then choose Application Processing.

2. Confirm that “ISIR Data” appears in the Import Type field. If it does not, click the down arrow and select ISIR Data.

3. If you are importing a new file, click the New File button. If you are re-importing a file you imported previously, click the Archived File button.

4. Click the File button to locate the file you want to import from your import data directory (for new files) or from your backup file (for archived files), select the file name, and click OK. The file name automatically appears in the Import From box.

5. Choose where you want to send the report: File, Printer, or Screen. If you choose File, click the File button and type a name for the file, then click Save.

If you chose File as your output destination, no paper copy is printed (the information is printed to the file in PDF format). To print a paper copy, locate the file, open it using a PDF-compatible program such as Adobe Reader, and print it.
You can also password-protect import reports printed to a file by entering a password in the **Password** and **Verify Password** fields. The printed file is encrypted in PDF format. To print a paper copy, repeat the print process and select Printer as your output destination.

If you chose **Screen** as your output destination, no paper copy is printed (the information is printed to your screen). Use the scroll bars to view the report and click **Close** when you are finished. To print a paper copy, click the **Print** button to print from the screen. You can also click the **Save** button to retain a copy of the report in PDF format.

6. Select **Prompt For Duplicates?** if you want EDExpress to display the IDs for ISIRs that are duplicates of those already in your database.

7. If you do not want to import NSLDS data, clear the **Import NSLDS Data?** checkbox.

8. Select the **Identify Activated Transactions?** checkbox if you want activated transactions identified.

9. Select the **Identify incoming ISIRs with existing Packaging, DL, Pell, or TEACH** checkbox if you want these records identified.

10. Select the **Compare demographic data?** checkbox if you want to be alerted to changes in demographic data.

11. Clear the **Update demographic data?** checkbox if you do not want demographic data updated.

12. Click **OK** to import the file. A progress bar appears within the In Progress dialog box.

13. Click **OK** to close the In Progress dialog box when the import is finished.

An import ID is created for a batch of records at the time you import the file. The identifier is 14 characters long and is in the format CCYYMMDDHHMMSS, the date and time at the start of the import. For example, “20180108120000” would be the import ID of a file imported on January 8, 2018 at 12:00 noon. You can use the identifier to print all the student records in an individual file. The import ID created when you import an ISIR file is printed on the Import Records Edit Report.

If you made a request for ISIRs from the ISIR Datamart on FAA Access to CPS Online using a query, the query title (up to 50 characters) is printed on the ISIR Import Records Edit Report when you import the file.

**Important Notes**

- **New for 2018-2019!** The EDExpress import process now archives imported data files automatically, storing the files in a compressed, password-protected ZIP file called Backup#.zip (where # is a number from 0-9 that is incremented each time the previous numbered backup file reaches 2 gigabytes or more in size). Archive files are stored in your default import data directory (as specified in File Management setup) and are accessible from the import dialog box by clicking the **Archived File** button.
When you import ISIRs and select the **Identify Activated Transactions?** checkbox, the EFC of the active transaction and the EFC of the incoming ISIR appear on the Import Records Edit Report if the transaction number on the import file is greater than or equal to the transaction number on the database and the EFCs are different.

ISIR data import types are listed under one category, ISIR Data, in the Import Type box.

When you import ISIRs and select the **Identify incoming ISIRs with existing Packaging, DL, Pell, or TEACH** checkbox, the Import Records Edit Report displays the “HAS FLAG” for Packaging, Direct Loan, and Pell if a record exists in those modules for the student.

When an assumption has been made on an ISIR, a notation is displayed on the ISIR Review tab alerting you to the assumption and referring you to the List Changes dialog box, where you can view the assumed value or values for the ISIR. To view these values, select **Process, List Changes** from the menu bar.
Printing ISIRs

You can print single or multiple ISIRs or the List–Processed ISIRs report after you have imported ISIR records into EDExpress. A printed ISIR includes all the applicant information submitted by the student and the computed results from the CPS.

New for 2018-2019! EDExpress now creates and stores all reports and lists in Adobe Portable Document Format (PDF). You are not required to have Adobe software installed on your PC workstation to print or view EDExpress reports. However, you must have Adobe Reader (free software) or Adobe Acrobat (licensed software) and either product’s associated Web browser plug-ins installed to use the Screen print option in EDExpress. If you do not have any Adobe products installed on your PC and you print a report to the Screen, EDExpress displays a warning message indicating it was unable to locate the appropriate Adobe browser plug-in and offers the option of saving the report or attempting to open the report using your operating system’s default viewer application.

New for 2018-2019! You can now apply password protection to EDExpress reports and lists you print to a file. To use this new functionality, select File as the report destination, then enter the same password in the Password and Verify Password fields. EDExpress saves the password-protected file it creates in PDF format in the destination folder.

New for 2018-2019! You can now indicate EDExpress reports you print frequently as “favorites” by clicking the star icon to the right of the report type in the Print dialog box. Reports marked as favorites appear automatically in the Favorites section of the EDExpress desktop, which allows you to access the print functionality for the report more quickly. To remove the designation of a report as a favorite, return to the Print dialog box for the report and click the star icon again. If you want to remove all reports designated as favorites from the EDExpress desktop, go to View, Desktop Settings and click Clear Favorites.

To print a single ISIR:

1. Select File, Print from the menu bar, then choose Application Processing.
2. Confirm that “ISIR” appears as the Report type.
3. Select Single as the Report option if it is not already selected.
4. Choose where to send the report: File, Printer, or Screen. If you want to send the report to a file, click the File button and type a name for the file, then click Save.

   If you chose File as your output destination, no paper copy is printed (the information is printed to the file in PDF format). To print a paper copy, locate the file, open it using a PDF-compatible program such as Adobe Reader, and print it.

   You can also password-protect import reports printed to a file by entering a password in the Password and Verify Password fields. The printed file is encrypted in PDF format. To print a paper copy, repeat the print process and select Printer as your output destination.
If you chose **Screen** as your output destination, no paper copy is printed (the information is printed to your screen). Use the scroll bars to view the report and click **Close** when you are finished. To print a paper copy, click the **Print** button to print from the screen. You can also click the **Save** button to retain a copy of the report in PDF format.

5. Type the student’s Social Security Number, first two letters of the last name, and transaction number (01, 02, etc.) in the Trankey field, or click the **ellipsis (…)** button and select the ISIR you want to print from a list of ISIRs.

6. The required School Code field defaults to the Federal School Code you defined as your Assumed School in School setup (**Tools**, **Setup**, **Global**, **School**).

If you are a servicer and received the same ISIR transaction for multiple Federal School Codes that you service, you can click the **ellipsis (…)** button and select a different Federal School Code to print on the ISIR. If you are printing from within a student’s record, the selection list is limited to the Federal School Codes sent on the ISIR transaction you are printing. If you are printing outside a student record, the selection list displays all Federal School Codes imported for all ISIRs; however, EDExpress only prints the ISIR if the selected Federal School Code is listed on a version of the transaction you imported.

EDExpress allows only one Federal School Code to be printed on each copy of an ISIR; the selected code is always printed in the School #1 position on the ISIR.

7. Select or clear the following options: **Only print records with more than six loans?**, **Print Certification/Signature Page?**, **Print FAA Comments?**, **Print SAR Comments?**, and **Print Loan Information?**

8. Click **OK**.

**To print multiple ISIRs:**

1. Select **File**, **Print** from the menu bar, then choose **Application Processing**.

2. Confirm that “ISIR” appears as the Report type.

3. Select **Multiple** as the Report option if it is not already selected.

4. Choose where to send the report: **File**, **Printer**, or **Screen**. If you choose to print to a file, click the **File** button and type a name for the file, then click **Save**.

   If you chose **File** as your output destination, no paper copy is printed (the information is printed to the file in PDF format). To print a paper copy, locate the file, open it using a PDF-compatible program such as Adobe Reader, and print it.

   You can also password-protect import reports printed to a file by entering a password in the **Password** and **Verify Password** fields. The printed file is encrypted in PDF format. To print a paper copy, repeat the print process and select Printer as your output destination.

   If you chose **Screen** as your output destination, no paper copy is printed (the information is printed to your screen). Use the scroll bars to view the report and click **Close** when you are finished. To print a paper copy, click the **Print** button to print from the screen. You can also click the **Save** button to retain a copy of the report in PDF format.
5. You have several options for choosing which ISIRs to print:
   - Click **OK** to print all the ISIRs in the EDExpress database.
   - Click the **Selection Criteria** button, then the **Select Records** button to choose specific ISIRs to print.
   - Use an SSN file. Click the **ellipsis (…)** button in the SSN File section of the dialog box. See Help for information about creating SSN files.
   - Use a query to select students. Click the **Selection Criteria** button, then click the **ellipsis (…)** button next to Query Title to select a query.
   - Use the import ID to print all the students in a particular file. Type the import ID in the Import ID field or click the **ellipsis (…)** button to select the import ID from a list.

6. Click the **down** arrow in the Sort Order field and select **SSN** or **Last Name** order. If you choose Last Name, records are sorted in order of last name, first name, and then transaction number. The default option is SSN order.

7. If you have a transaction preference, click the **down** arrow under Transaction Preference? and select **Highest**, **Active**, or **All** to print the highest transaction, the active transaction, or all transactions, respectively. If no transaction is activated, the default is the highest transaction.

8. The School Code field defaults to the Federal School Code you defined as your Assumed School in School setup (**Tools**, **Setup**, **Global**, **School**). If you are a servicer and received the same ISIR transaction for multiple Federal School Codes that you service, you can click the **ellipsis (…)** button and select a different Federal School Code to print on the ISIRs.
   As with printing individual ISIRs, EDExpress allows only one Federal School Code to be printed on each copy of an ISIR; the selected code is always printed in the School #1 position on the ISIR. EDExpress only prints the ISIRs if the Federal School Code selected is present on the transactions.

9. Select or clear the following options: **Only print records with more than six loans?**, **Print Certification/Signature Page?**, **Print FAA Comments?**, **Print SAR Comments?**, and **Print Loan Information?**

10. Click **OK**.

**Important Note**
- The e-mail address that is printed on the ISIR is labeled “E-mail Address 1” on the Demo tab but is printed on the ISIR as “E-mail Address.”

*To print the List–Processed ISIRs report:*
1. Select **File**, **Print** from the menu bar.
2. Select the **Application Processing** tab.
3. Click the **down** arrow in the Report box and select **List–Processed ISIRs**.
4. Click **Printer**, **File**, or **Screen** for the output destination. If you want to send the report to a file, click the **File** button and type a name for the file, then click **Save**.

If you chose **File** as your output destination, no paper copy is printed (the information is printed to the file in PDF format). To print a paper copy, locate the file, open it using a PDF-compatible program such as Adobe Reader, and print it.

You can also password-protect import reports printed to a file by entering a password in the **Password** and **Verify Password** fields. The printed file is encrypted in PDF format. To print a paper copy, repeat the print process and select **Printer** as your output destination.

If you chose **Screen** as your output destination, no paper copy is printed (the information is printed to your screen). Use the scroll bars to view the report and click **Close** when you are finished. To print a paper copy, click the **Print** button to print from the screen. You can also click the **Save** button to retain a copy of the report in PDF format.

5. (Optional) Click the **down** arrow next to **Sort Order** to specify the order in which you want ISIR data to print.

6. (Optional) Click the **down** arrow next to **Transaction Preference** to specify which ISIR transactions you want included on the report.

7. (Optional) Click the **ellipsis (…)** button to the right of **Import ID** to select the import ID associated with the ISIRs you want included on the report.

8. (Optional) Select or deselect other options as appropriate.

9. (Optional) Click the **Selection Criteria** button if you want to use specific selection criteria to narrow the number of records you want included on the report.

10. Click **OK** to send the list to the output destination you chose.
App Express FISAP Reports

Printing FISAP Reports in App Express

You can print the FISAP–Dependent Student Summary, FISAP–Independent Student Summary, FISAP–Eligible Dependent Students, and FISAP–Eligible Independent Students reports from the App Express module or the Packaging module. This flexibility enables both EDExpress Packaging and non-Packaging users to take advantage of these reports.

To help you prepare your student records for inclusion in the App Express version of the FISAP reports, you must update the Enrollment Status field on the Demo tab. You can do this manually on the tab, by using Global Multiple Entry, or by importing external demographic data.

When generating the App Express FISAP reports, EDExpress uses the Enrollment Status field value from the Demo tab in combination with FISAP-related data from the ISIR flagged as the active transaction on the ISIR Review tab.

To ensure the accuracy of the EDExpress FISAP reports you print using the App Express module, prepare your student records in advance by verifying the Enrollment Status values on the Demo tab and the active transaction values selected on the ISIR Review tab are current and accurate and that you have imported all 2018-2019 ISIR data.

To prepare your data and print FISAP reports using the App Express module:

1. Import all 2018-2019 ISIR files you have received from the CPS. The ISIR transaction you identify as the active transaction on the ISIR Review tab is used by EDExpress to extract FISAP-related information for the reports, such as Total Income.

2. Review the demographic (Demo tab) records of all student records in your database and verify Enrollment Status values.
   a) Delete records for students who did not attend your school.
   b) Try printing the Student Summary report (File, Print, Global) for multiple students with a query attached that identifies records with a blank Enrollment Status field value. Access the student records that print on the report and either update the missing value or delete the record.
c) Verify Enrollment Status values are accurate for the remaining students in your database. You may need to consult internal enrollment rosters for this information.

d) Use Global Multiple Entry (Process, Multiple Entry, Global) to review and update the Enrollment Status for multiple student records at once, if needed.

3. Review the ISIR selected as the active transaction for your students on the ISIR Review tab.
   a) The Active Transaction field on the ISIR Review tab defaults to the highest valid ISIR transaction you have imported for the student.
   b) To review the current active transaction selections for ISIRs in your database, print the List-Processed ISIRs report (File, Print, Application Processing). Before printing the report, select Active for the Transaction Preference? field on the print dialog box.
   c) To modify the active transaction selected on the ISIR Review tab for a student, change the transaction number listed in the Inactive Transaction to Display field to the ISIR transaction you want to base the FISAP report calculations on, then click Process, Activate Transaction. You cannot activate rejected ISIR transactions.

4. To print the FISAP reports after you have completed the steps above, select File, Print from the menu bar, then select the Application Processing tab.

5. Click the down arrow in the Report box and select FISAP–Eligible Dependent Students, FISAP–Eligible Independent Students, FISAP–Dependent Student Summary, or FISAP–Independent Student Summary.

6. Select Single as the Report option if it is not already selected.

7. Choose where to send the report: File, Printer, or Screen. If you want to send the report to a file, click the File button and type a name for the file, then click Save.

   If you chose File as your output destination, no paper copy is printed (the information is printed to the file in PDF format). To print a paper copy, locate the file, open it using a PDF-compatible program such as Adobe Reader, and print it.

   You can also password-protect import reports printed to a file by entering a password in the Password and Verify Password fields. The printed file is encrypted in PDF format. To print a paper copy, repeat the print process and select Printer as your output destination.

   If you chose Screen as your output destination, no paper copy is printed (the information is printed to your screen). Use the scroll bars to view the report and click Close when you are finished. To print a paper copy, click the Print button to print from the screen. You can also click the Save button to retain a copy of the report in PDF format.

8. (Optional) Select the Print Details? checkbox if you want the report to display each student ID for each income category.

9. Click OK.

10. Repeat steps 4-9 as needed to print each FISAP report.
**Important Notes**

- You can also use the existing Packaging versions of the FISAP reports. You must first establish a basic Packaging setup, then import all valid ISIR data into Packaging. See the “Print FISAP Reports in Packaging” section later in this desk reference for guidance on using the FISAP reports in the Packaging module.

- The FISAP–Eligible Dependent Students and FISAP–Eligible Independent Students reports can help you prepare Part II, Section F of the FISAP report. The FISAP–Dependent Student Summary and FISAP–Independent Student Summary reports can help you prepare the Income Grid section of the Program Summary (Part VI) portion of the FISAP.
Exporting External Demographic and ISIR Data

External Demographic Data Export
EDExpress enables you to export demographic data to an external system. You can create Global file formats that include any of the fields on a student’s demographic record, including the student’s e-mail addresses. File formats are limited to a maximum of 255 fields.

New for 2018-2019! We updated the Export dialog box in each EDExpress module to add a password protection option for export files for additional security. To use this optional feature, enter and verify a password value in the Password and Verify Password fields in the Export dialog box prior to initiating the export. The exported file is saved in encrypted ZIP format. The password protection option is only available in the export dialog box for external exports; you cannot apply encryption to export types that are intended for transmission to Federal Student Aid data processors.

To export external demographic data:
1. Close any records that are open.
2. Select File, Export from the menu bar, then choose Global.
3. Confirm that “External Demographic Data” appears in the Export Type field. The default path and file name appear in the Export To field.
4. If you want to export using a different file name, click the File button and type a name for the file, then click Save.
5. (Optional) If you want to password-protect your export file, enter the same password in the Password and Verify Password fields. The export file will be saved in encrypted ZIP format.
6. Select the delimiter type.
7. Type the format code in the Format Code field, or click the **ellipsis (…)** button to select from a list of format codes.

8. (Optional) Click **Selection Criteria** to narrow the group of records you want to export. When you are finished, click **OK**.

9. Click **OK** to export the data. EDExpress exports the file to the directory shown in the Export To field. An In Progress dialog box appears.

10. Click **OK** to close the In Progress dialog box when the export is finished.

**Important Note**

- To use the external export feature in Global, you must establish a file format. See the topic “File Formats” in the EDExpress Help for more information.
External ISIR Export

EDExpress enables you to export ISIR data to an external system.

New for 2018-2019! We updated the Export dialog box in each EDExpress module to add a password protection option for export files for additional security. To use this optional feature, enter and verify a password value in the Password and Verify Password fields in the Export dialog box prior to initiating the export. The exported file is saved in encrypted ZIP format. The password protection option is only available in the export dialog box for external exports; you cannot apply encryption to export types that are intended for transmission to Federal Student Aid data processors.

To export external ISIR data:

1. Close any records that are open.
2. Select File, Export from the menu bar, then choose Application Processing.
3. Confirm that “External ISIR” appears in the Export Type field. The default path and file name appear in the Export To field.
4. If you want to export using a different file name, click the File button and type a name for the file, then click Save.
5. (Optional) If you want to password-protect your export file, enter the same password in the Password and Verify Password fields. The export file will be saved in encrypted ZIP format.
6. Select the transaction preference.
7. Select the delimiter type.
8. Type the format code in the Format Code field, or click the ellipsis (…) button to select from a list of format codes.
9. (Optional) Click Selection Criteria to narrow the group of records you want to export. When you are finished, click OK.
10. Click OK to export the data. EDExpress exports the file to the directory shown in the Export To field. An In Progress dialog box appears.
11. Click OK to close the In Progress dialog box when the export is finished.

Important Note

- To use the external export feature in App Express, you must establish a file format. See the topic “File Formats” in the EDExpress Help for more information.
What Is Packaging?

Financial aid packaging is the process of tracking, awarding, and managing financial aid funds or resources. EDExpress Packaging uses the term award methodology. An award methodology is a formula that determines how financial aid funds are allocated to your students. Within EDExpress, the Package process automatically applies your school’s award methodologies that you set up in the software to one or all of your students. Your students are packaged or awarded aid from the sources and amounts specified by your award methodologies and the criteria you attach to them.

This section of the desk reference guides you through the packaging process from setup through exporting your data. We recommend that you review the checklist provided at the beginning of the Packaging Setup section to get started.

Important Notes

- The Release 1.0 Packaging module awards Pell Grant funds based on the 2017-2018 Pell Grant payment and disbursement schedules published in Dear Colleague Letter GEN-16-19, posted on October 18, 2016 to the Information for Financial Aid Professionals (IFAP) Web site, located at ifap.ed.gov.

  After ED’s Fiscal Year 2018 Appropriation is finalized, we will update the Pell Grant Payment Schedule, if necessary, through a future release of EDExpress. If you use the EDExpress Packaging module to award Pell Grants, you may want to wait until it is known if the Pell Payment Schedule changes.

- For compliance with Section 508 of the Rehabilitation Act, all required fields highlighted in yellow display an “-R” at the end of the field label. Fields that turn blue when the value is changed display a “-C” at the end of the field label when the change is saved.
Packaging Setup

Packaging Setup Checklist

Follow the steps below before using the EDExpress Packaging module. The key to successful packaging with EDExpress is to plan and define your school guidelines thoroughly.

- Plan priority order for budget codes and award methodology codes
- Create queries for budget codes, fund maintenance codes, and award methodology codes
- Set up system values
- Establish academic year profiles
- Enter fund maintenance information
- Define award methodologies
- Establish budgets
- (Optional) Define SAP values
- (Optional) Set up a user-defined database (see “Set Up a User Database” section in this desk reference for more information)
- (Optional) Set up user-defined formulas
- (Optional) Write user-defined text (see “Create User-Defined User Letter Text,” “Create User-Defined Award Letter Text,” and “Create User-Defined Document Tracking Letter Text” in this desk reference for more information)

Important Notes

- If you have not established your assumed school in Global System setup, you must do so before using the Packaging module.
- You can save time by importing much of your Packaging setup from EDExpress 2017-2018. See “Prior Year Import” in this desk reference for additional information.
• If you are using the Packaging module only to print the FISAP–Eligible Dependent Students and FISAP–Eligible Independent Students reports, you only have to set up an academic year profile and a budget before importing ISIRs into Packaging. Refer to the EDExpress Help topic “Set Up Packaging to Print FISAP Reports” for detailed setup instructions.

• Complete all query setups before packaging any records.
Assign Priorities to Packaging Functions

Two packaging elements—Award Methodology and Budgets—are assigned according to priorities you establish.

Priority determines the order in which EDExpress evaluates packaging elements when making assignments, starting at the element with priority closest to 1.

The Packaging module compares the criteria assigned to that element with the student record being processed. If the record meets the given criteria, then that element is assigned to the record and no further elements of this type are considered. If the record does not meet the criteria, EDExpress goes to the element with the next highest priority. Priority is established highest to lowest, 1...999, A...ZZZ.

Example:

<table>
<thead>
<tr>
<th>Code</th>
<th>Priority</th>
<th>Criteria</th>
</tr>
</thead>
<tbody>
<tr>
<td>030</td>
<td>3</td>
<td>Dependency Status = I</td>
</tr>
<tr>
<td>020</td>
<td>2</td>
<td>Dependency Status = D</td>
</tr>
<tr>
<td>015</td>
<td>1</td>
<td>Dependency Status = D and Housing = 2</td>
</tr>
</tbody>
</table>

A dependent student who reports housing plans of 3 would not meet the criteria for Code 015. However, the student meets the next criteria and is assigned Code 020.

Important Notes

- The element with the most restrictive criteria should have the priority closest to 1 so that it is assessed and assigned first.
- The last priority should have no selection criteria, so it will include those students whose records are missing elements considered critical by your selection criteria.
- You may want to number the priorities in increments of 5 or 10 to give yourself more flexibility in the future for adding subsequent priorities between the previously created priorities. For example, by establishing priorities 5, 10, 15, etc., you can easily add a priority 13 that processes between priorities 10 and 15.
# Packaging System Setup

*To set up Packaging system values:*

1. Select **Tools, Setup** from the menu bar, then choose **Packaging, System**.
2. Enter the following values:

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Total Number of Award Letters to be Printed per Student?</strong></td>
<td>This field defines the number of copies of the award letters to print for each student each time award letters are printed.</td>
</tr>
<tr>
<td><strong>Maximum Number of Award Letters to be Sent per Student?</strong></td>
<td>This field defines the number of times an award letter can be printed for an individual student when printing letters for multiple students.</td>
</tr>
</tbody>
</table>
| **Award Letter Type** | This field defines which award letter type you want to print.  
  O = Offer Letter  
  N = Notification Letter |
| **Allow imported Pell EFC to be Modified?** | This field defines whether the Pell EFC is a protected field on records that were not manually entered. Select the checkbox if you want to allow the Pell EFC field to be modified after the ISIR is imported into Packaging. |
| **Packaging Results Default Status** | This field defines the packaging results default status on a student record after packaging. The two default options are:  
  O = Offered  
  A = Accepted |
| **Priority Deadline Date Type** | This field defines the date type you want to use as your priority deadline date when indexing for packaging process and reports. Valid priority date types are:  
  A = Application Received Date  
  P = Processed Date  
  R = Ready Date  
  U = User-Defined Date  
  If the date type is U, the date is taken from the User Database field. |
<table>
<thead>
<tr>
<th>Parameter</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>User Defined Date Name</td>
<td>This field defines the name of the User Database to be used when determining which student records to include or exclude in running a process. It is enabled only if the priority deadline date type is U (User-Defined Date).</td>
</tr>
</tbody>
</table>
| Default Housing Plans     | This field defines a default value for manually created records and imported ISIRs with a blank value for Housing Plans. Valid housing plan options are: 
  1 = On campus 
  2 = With parent 
  3 = Off campus                                                          |

3. Click **OK** to continue.

4. Click **Yes** to save.
Establish Academic Year Profiles

Academic year profiles determine how your funds are divided. Academic Year Profile setup enables you to customize up to five terms, including distribution percentages for seven types of awards. You can create an unlimited number of academic year profiles.

For the academic year profiles, gather and enter information for Federal Pell Grant formulas (standard term, clock-hours, etc.) and distribution percentages for aid programs.

To establish academic year profiles:

1. Select Tools, Setup from the menu bar, then choose Packaging, Academic Year Profile.
2. If this is your first time adding an academic year profile, go to Step 3. To add more academic year profiles, click Add.
3. Enter or confirm the following values:

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Code</td>
<td>This code is a four-character code you assign to identify each academic year profile.</td>
</tr>
<tr>
<td>Default</td>
<td>This field enables you to define your standard academic year profile for all records when importing from the ISIR database. Each school has only one default profile. However, if the profile is not assigned to any students, you can change this field at any time.</td>
</tr>
<tr>
<td>User Modified</td>
<td>The user ID of the person who last modified the academic year profile.</td>
</tr>
<tr>
<td>Date Modified</td>
<td>The date the academic profile was last modified.</td>
</tr>
<tr>
<td>Title</td>
<td>The title is the 50-character description of the academic year profile you have established.</td>
</tr>
<tr>
<td>Pell Grant Formula</td>
<td>This field is based on the school’s definition of an academic year. Click the down arrow to view a list of valid Pell formulas:</td>
</tr>
<tr>
<td></td>
<td>1–Standard-term, credit-hour programs (30 weeks)</td>
</tr>
<tr>
<td></td>
<td>2–Standard-term, credit-hour programs (&lt;30 weeks)</td>
</tr>
<tr>
<td></td>
<td>3–Any term-based credit-hour programs</td>
</tr>
<tr>
<td></td>
<td>4–Clock hour programs and credit-hour programs without terms</td>
</tr>
<tr>
<td></td>
<td>5–Correspondence Study, non term-based program</td>
</tr>
<tr>
<td></td>
<td>6–Correspondence Study, term-based program</td>
</tr>
<tr>
<td>Program Proration Percent</td>
<td>This field specifies the percentage of the student’s program to be completed in the academic year. It applies only to:</td>
</tr>
<tr>
<td></td>
<td>• Standard term credit-hour programs of less than 30 weeks,</td>
</tr>
<tr>
<td></td>
<td>• Clock-hour and credit-hour programs without terms, and</td>
</tr>
<tr>
<td></td>
<td>• Correspondence study non-term-based programs</td>
</tr>
<tr>
<td>Parameter</td>
<td>Description</td>
</tr>
<tr>
<td>-----------------------------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>EFC program length to import from the ISIR database</td>
<td>This field sets the EFC Program Length derived from imported ISIR records.</td>
</tr>
<tr>
<td>Term</td>
<td>This field identifies a specific term that you designate. For example, Fall, Spring, Term One, Term Two, etc.</td>
</tr>
<tr>
<td>Enrollment Status</td>
<td>This field indicates the enrollment status to package for each term you define. For example, full-time, etc.</td>
</tr>
<tr>
<td>Percentages</td>
<td>This field defines the percentage of an annual award to post to a given term for each of seven aid types. For example, enter 50% for Perkins % to the first term if you want 50% of the annual Perkins amount awarded in the first term. Percentages cannot exceed 100%.</td>
</tr>
</tbody>
</table>

4. Click **OK** to continue.

5. Click **Yes** to save.
Enter Fund Maintenance Information

In Fund Maintenance setup, you can add and maintain as many aid sources as needed for packaging students. Fund Maintenance also provides you with instant information on the total funds awarded to your financial aid recipients.

To set up Fund Maintenance:

1. Select Tools, Setup from the menu bar, then choose Packaging, Fund Maintenance.
2. If this is your first time adding a fund, go to Step 3 below. For more funds, click Add.
3. Enter or confirm the following values:

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>User Modified</td>
<td>The user ID of the person who last modified the fund.</td>
</tr>
<tr>
<td>Date Modified</td>
<td>The date the fund was last modified.</td>
</tr>
<tr>
<td>Fund Code</td>
<td>This code is an abbreviated identification code (of up to eight characters) you assign to identify each fund.</td>
</tr>
<tr>
<td>Fund Description</td>
<td>This description is a full description (of up to 25 characters) of the fund you have established.</td>
</tr>
<tr>
<td>Aid Type</td>
<td>This field identifies the type of aid associated with this fund. Click the down arrow for a list of valid aid types. Aid types D, E, F, K, P, S, W, and U can be used only once, after which they no longer appear on the list.</td>
</tr>
</tbody>
</table>

- **E** = Federal Supplemental Education Opportunity Grant (FSEOG)
- **F** = Federal Pell Grant
- **G** = Any grant or scholarship, but not Pell Grant or FSEOG
- **R** = Grant Non-Need Based
- **K** = Federal Perkins loan
- **N** = Non-Need Based Loan (NNB)
- **L** = Other Need Based Loan (NB), not Perkins or Direct
- **S** = Subsidized Loan (Sub, Need Based)
- **T** = Teacher Education Assistance for College and Higher Education Grants (TEACH Grant)
- **U** = Unsubsidized Loan (Unsub, Non-need Based)
- **D** = Unsubsidized Loan (Unsub, Need Based)
- **P** = Federal Parent Loan for Undergraduate Students (PLUS)
- **O** = Outside Resources
- **V** = AmeriCorps
- **W** = Federal Work-Study (FWS)
- **Y** = Other Work-Study

Enter Fund Maintenance Information
<table>
<thead>
<tr>
<th>Parameter</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Do not remove if unpackaged?</td>
<td>Select this checkbox if you want awards of this fund code to remain unmodified on a student record during the Unpackage process. If you activate this feature and repackage your students, funds may be awarded a second time.</td>
</tr>
<tr>
<td>Criteria</td>
<td>Use this field to select queries to determine the group of students eligible to receive this fund.</td>
</tr>
<tr>
<td>Beginning Balance</td>
<td>This field represents the beginning balance in your school’s account for the upcoming year.</td>
</tr>
<tr>
<td>Adjustment to Beginning Balance</td>
<td>This field represents any adjustments (+ or -) to be made to the fund.</td>
</tr>
<tr>
<td>Funds Awarded</td>
<td>This field reflects the current amount awarded to your eligible financial aid applicants.</td>
</tr>
<tr>
<td>Current Balance</td>
<td>This field represents the current outstanding fund balance remaining for your school to award. Once your current balance reaches zero, you can no longer award this fund to students (unless you enter a positive amount in the Adjustment to Beginning Balance field).</td>
</tr>
<tr>
<td>Remaining Need</td>
<td>Click this button to establish minimum and maximum need amounts for this fund. See the following section for additional information.</td>
</tr>
</tbody>
</table>

4. Click **OK** to continue.

5. Click **Yes** to save.

**Important Notes**

- Make sure that the aid type you selected matches the fund you are creating; for example, **F** = Federal Pell Grant.
- For Fund Maintenance examples, click **Help** in the Fund Maintenance dialog box, then choose the related topic Fund Maintenance Setup Examples.
Enter Remaining Need Information

You can award a specific amount from a fund at different levels of remaining need within the packaging process. For example, if you have a school fund that you want to award for different levels depending on the remaining need of the aid recipient, you can do so with this feature. Remaining need is optional for Packaging.

**Example**

Fund: School Need-Based Scholarship (Aid Type G)

After awarding Stafford loans (Sub/Unsub), if there is still at least $2,500 or greater remaining need, you can direct Packaging to award $500. If at least $2,000 to $2,499 you award $300; if between $500 and $1,999 you award $150.

The following aid types are excluded:

<table>
<thead>
<tr>
<th>F</th>
<th>Federal Pell Grant</th>
</tr>
</thead>
<tbody>
<tr>
<td>O</td>
<td>Outside Resources</td>
</tr>
<tr>
<td>T</td>
<td>Teacher Education Assistance for College and Higher Education Grants (TEACH Grant)</td>
</tr>
<tr>
<td>V</td>
<td>AmeriCorps</td>
</tr>
</tbody>
</table>

You can set your remaining need amounts for all funds in Fund Maintenance setup by clicking the Remaining Need button, or you can set (or adjust) the remaining need amounts for each fund in the award methodology by clicking the Values button in the Remaining Need column.

The Remaining Need dialog box contains the following fields:

| Minimum Need | Enter the minimum remaining need amount for awarding this fund. |
| Maximum Need | Enter the maximum remaining need amount for awarding this fund. |
| Award Amount | Enter the amount of this fund that you will award based on the Minimum and Maximum Need range. |

**Important Note**

- Minimum and maximum need amounts on one line should not overlap with the minimum and maximum need amounts on any other line. For example, if the first range is 0-500, the next range should start with 501 or higher.
Define Award Methodologies

You can establish methodologies for determining how various funds are awarded to a specific population of students. You must choose whether you will enter maximum percentages or dollar amounts.

For award methodology examples, click Help in the Award Methodology dialog box, then choose the related topic Award Methodology Setup Examples.

Important Notes

- For Funds Subsidized Loans (S), Unsubsidized Loans Non-need Based (U), Unsubsidized Loans Need Based (D), and PLUS Loans (P), we recommend you leave all 9s for the maximum EFC and the maximum amount. The system will calculate according to the statutory guidelines.

- Since the Federal Pell Grant is a calculated award, you cannot include the Pell Grant in your award methodology. EDExpress automatically awards Pell to eligible students if Pell is correctly defined in Fund Maintenance.

- Use the Criteria field to identify the group of students who will be packaged using this methodology. The criteria listed are created in Query.

- If you need to base your award methodology on EFC ranges, such as for a state grant that uses EFC ranges as criteria, you can have too many ranges to define in one award methodology code and still include other funds. In this situation, you can define Packaging queries for each EFC range. Add the EFC queries as primary query criteria to an equal number of award methodologies, then add the state grant to each methodology by using the Award Min and Award Max fields to control the exact award amount for that EFC range.

To define award methodologies:

1. Select Tools, Setup from the menu bar, then choose Packaging, Award Methodology.
2. If this is your first time adding an award methodology, go to Step 3. To add more award methodologies, click Add.
3. Enter or confirm the following values:

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Code</td>
<td>This code is a four-character, user-defined code used to identify the methodologies.</td>
</tr>
<tr>
<td>User Modified</td>
<td>The user ID of the person who last modified the award methodology.</td>
</tr>
<tr>
<td>Date Modified</td>
<td>The date the award methodology was last modified.</td>
</tr>
<tr>
<td>Title</td>
<td>The title is the description (of up to 50 characters) of the award methodology. It should identify which students will be packaged using this methodology.</td>
</tr>
<tr>
<td>Priority</td>
<td>This field prioritizes the methodology in relation to other methodologies during the packaging process. During the packaging process, EDExpress selects the highest priority methodology met by the student. Consider creating a generic methodology and give it the lowest priority (in other words, highest number) to ensure every student is packaged, regardless of the criteria used in your other methodologies.</td>
</tr>
<tr>
<td>Use Percentages or Use Dollar Amount</td>
<td>These options enable you to use percentages or dollar amounts for the Self-Help and Gift Aid Maximum fields. Select the appropriate option.</td>
</tr>
<tr>
<td>Self-Help Aid Maximum</td>
<td>This field identifies the maximum of need to be met with self-help aid during the packaging process. This can be a percentage or a specific dollar amount.</td>
</tr>
<tr>
<td>Gift Aid Maximum</td>
<td>This field identifies the maximum of need to be met with gift aid during the packaging process. This can be a percentage or a specific dollar amount.</td>
</tr>
<tr>
<td>Criteria</td>
<td>This field determines what methodology is applied to a student’s record, using your existing queries.</td>
</tr>
<tr>
<td>Fund Code</td>
<td>This field represents the fund codes associated with this award methodology to be used during the packaging process. Click the down arrow for a list of available fund codes.</td>
</tr>
<tr>
<td>Fund Priority</td>
<td>This field indicates the order in which funds will be awarded within this award methodology. Funds with priority 1 are awarded first.</td>
</tr>
<tr>
<td>School Min</td>
<td>This field indicates the minimum amount awarded for this fund within the award methodology.</td>
</tr>
<tr>
<td>Parameter</td>
<td>Description</td>
</tr>
<tr>
<td>---------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>School Max</td>
<td>This field indicates the maximum amount awarded for this fund within the award methodology.</td>
</tr>
<tr>
<td>Min EFC</td>
<td>This field identifies the minimum EFC allowed for this fund to be packaged when using the award methodology.</td>
</tr>
<tr>
<td>Max EFC</td>
<td>This field identifies the maximum EFC allowed for this fund to be packaged when using the award methodology.</td>
</tr>
<tr>
<td>Remaining Need</td>
<td>Click the Value button to view the remaining need values established in Fund Maintenance setup or to establish a remaining need value at the award methodology level. You can also modify values established in Fund Maintenance.</td>
</tr>
</tbody>
</table>

4. Click **OK** to continue.

5. Click **Yes** to save.
Establish Budgets

A budget defines the cost of attendance for a specified program in a standard academic year. An integral part of packaging at your school begins with assigning a budget for an applicant. In Packaging, you create customized budgets to meet your school’s needs. You can create a single budget for your entire applicant population or separate budgets for subsets of your students.

For budget examples, click the Help in the Budgets dialog box, then choose the related topic Budget Setup Examples.

To establish budgets:

1. Select Tools, Setup from the menu bar, then choose Packaging, Budgets.
2. If this is your first time adding a budget, go to Step 3 below. For more budgets, click Add.
3. Enter or confirm the following values:

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>User Modified</td>
<td>The user ID of the person who last modified the budget.</td>
</tr>
<tr>
<td>Date Modified</td>
<td>The date the budget was last modified.</td>
</tr>
<tr>
<td>Budget Code</td>
<td>This code is a four-character, user-defined abbreviated identification code assigned to each budget. This code appears on the student’s record.</td>
</tr>
<tr>
<td>Priority</td>
<td>This field enables you to prioritize the order in which EDExpress searches the budget database when assigning budgets. The first budget in which the student meets the selection criteria is used to package that student.</td>
</tr>
<tr>
<td>Budget Total</td>
<td>This field is the sum of the budget component amounts you entered, and is display only.</td>
</tr>
<tr>
<td>Pell COA</td>
<td>This field is used to calculate Pell awards only and can be modified in individual records and in multiple records using Multiple Entry.</td>
</tr>
<tr>
<td>Title</td>
<td>The title is the description of the budget. The title can be up to 50 characters.</td>
</tr>
<tr>
<td>Criteria</td>
<td>This field determines which budget is applied to a given student using your existing queries.</td>
</tr>
<tr>
<td>Budget Amounts</td>
<td>This field defines the amounts for the six budget components listed: Tuition and Fees, Loan Fees, Room and Board, Books and Supplies, Transportation Costs, and Miscellaneous. These can be left blank.</td>
</tr>
<tr>
<td>User Defined</td>
<td>If the student’s budget contains other components, enter the title and amount here.</td>
</tr>
<tr>
<td>Budget Amounts</td>
<td></td>
</tr>
</tbody>
</table>
4. Click **OK** to continue.
5. Click **Yes** to save.

**Important Note**
- Before packaging, a budget *must* be assigned to each student’s record.
Define SAP Values (Optional)

EDExpress enables you to track Satisfactory Academic Progress (SAP) for each of your students. SAP Values give you the ability to develop separate codes for different types of progress. For example: S = Satisfactory Progress and U = Unsatisfactory Progress.

You can prevent records from being packaged if students do not meet your SAP criteria by creating SAP codes containing the No Packaging Flag. You must add the codes to student records before the packaging process. You can define an unlimited number of SAP codes.

For SAP values examples, click the Help button in the SAP Values dialog box.

To define SAP codes:

1. Select Tools, Setup from the menu bar, then choose Packaging, SAP Values.
2. Enter the following values for each SAP code:

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>SAP Code</td>
<td>This field is a two-character alphanumeric identifier.</td>
</tr>
<tr>
<td>No Packaging Flag</td>
<td>This option prevents students with this code from being packaged.</td>
</tr>
<tr>
<td>SAP Description</td>
<td>This field is a 50-character description of the code.</td>
</tr>
</tbody>
</table>

3. Click OK to continue.
4. Click Yes to save.
Set Up User-Defined Formulas (Optional)

User-defined formulas allow you to calculate data by adding, subtracting, multiplying, or dividing two existing fields in the EDExpress database.

For examples of user-defined formulas, click the Help button in the lower portion of the User-Defined Formulas dialog box. Use the down arrow to scroll to the User-Defined Formulas Examples.

To set up user-defined formulas:

1. Select Tools, Setup from the menu bar, then choose Packaging, User-Defined Formulas.
2. Enter or confirm the following values for each formula field you want to add to your database:

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Table</td>
<td>This setting determines where the value you use in Field 1 resides. Enter:</td>
</tr>
<tr>
<td></td>
<td>• S for a field from the Student Table (student database)</td>
</tr>
<tr>
<td></td>
<td>• F for a field from the Fund Table (fund maintenance database)</td>
</tr>
<tr>
<td></td>
<td>• U for a field from the User-Defined Table (user-defined database)</td>
</tr>
<tr>
<td>Field Name</td>
<td>This field lists all the fields that are available from the table chosen in the Database Table 1 Field.</td>
</tr>
<tr>
<td>Operand</td>
<td>This option lists the mathematical operations available: addition, subtraction, multiplication, or division.</td>
</tr>
<tr>
<td>Table</td>
<td>This setting determines where the value you use in Field 2 resides. Enter:</td>
</tr>
<tr>
<td></td>
<td>• S for a field from the Student Table (student database)</td>
</tr>
<tr>
<td></td>
<td>• F for a field from the Fund Table (fund maintenance database)</td>
</tr>
<tr>
<td></td>
<td>• U for a field from the User-Defined Table (user-defined database)</td>
</tr>
<tr>
<td>Field Name</td>
<td>This field lists all the fields that are available from the table chosen in the Database Table 2 field.</td>
</tr>
<tr>
<td>Description</td>
<td>This description displays the name of the field that describes the result of your formula.</td>
</tr>
</tbody>
</table>

3. Click OK to continue.
4. Click Yes to save.
**Important Notes**

- The calculated results from any previously created user-defined formula can be used as a new formula field (in the S or Student database table) in another user-defined formula.
- Set up user-defined formulas *before* importing records into the Packaging database.
- You can create a user-defined formula after importing records into Packaging. After importing your records, create the new formula, then select **Process, Calculate User-Defined Formulas** from the menu bar to apply the new formula to your records.
Creating Packaging Records

Packaging Entry

You can use three types of entry to establish a packaging record:

- **Manually** enter data from a printed document, such as a SAR, an ISIR, or a paper FAFSA.
- **Import ISIR data** from the application processing module of EDExpress (App Express).
- **Import records** from your school system using the Import External Add option.

**Important Note**

- If you intend to import records from your school system, you must follow the record layouts found in the *EDExpress 2108-2019 Packaging Technical Reference*. It is available for download in Adobe PDF format from the U.S. Department of Education’s Federal Student Aid Download (FSAdownload) Web site, located at [fsadownload.ed.gov](http://fsadownload.ed.gov).
Manual Entry

If a student does not already have a demographic record in the database, follow the steps below to enter the student’s record manually.

To enter a student record manually:
1. Select File, New from the menu bar.
2. Enter the student’s SSN.
3. Enter the student’s demographic information on the Demo tab. At minimum, you must enter a first or last name. For packaging purposes, enter the student’s dependency status.
4. Click Save.
5. Click the Awards tab.
6. Complete the student’s packaging record. Press F1 for help with completing each field.
7. To save the packaging record, select File, Save from the menu bar.
8. To return to the EDExpress main screen, select File, Close from the menu bar.

Important Note
- Make sure the correct dependency status appears on the Demo tab. The Packaging module awards funds based in part on the value in this field.
Importing ISIRs

You can quickly establish a student’s financial record by importing the student’s ISIR data from App Express. The ISIR import process imports the active transaction. See EDExpress Help for more information.

To import ISIRs:

1. If you have new ISIR data in your EDExpress database, the Packaging Data – ISIR Data import type appears in the Pending Imports pane of the EDExpress Desktop. To use the Pending Imports pane option to import ISIR data into Packaging, click the Import button under the import type. Otherwise, select File, Import from the menu bar, then choose Packaging, Packaging Data–ISIR Data.

2. Enter the following values:

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Report To</td>
<td>Choose Printer, File, or Screen to print, send to a file, or view the Packaging Import ISIR Data report. The report shows the results of the ISIR import process.</td>
</tr>
<tr>
<td>Password and Verify Password</td>
<td>Enter the same password in both fields to apply password protection to your import edit report if you are printing to a file. EDExpress saves the password-protected file it creates in PDF format in the destination folder.</td>
</tr>
<tr>
<td>Add Budgets?</td>
<td>Choose this option to assign budgets automatically to the students upon import.</td>
</tr>
<tr>
<td>Print a list of imported</td>
<td>Choose this option to print a list of records added during the ISIR import</td>
</tr>
<tr>
<td>Academic Year Profile</td>
<td>Choose this option to assign an academic year profile to each record during the ISIR import process. Click the ellipsis (...) button to display and select from a list of codes.</td>
</tr>
<tr>
<td>Selection Criteria</td>
<td>Choose Selection Criteria to narrow the selection of students during the ISIR import process.</td>
</tr>
</tbody>
</table>

3. Click OK.

Important Notes

- To avoid packaging a student’s record in error, the Packaging module does not import rejected ISIRs from the App Express module.
- You must have at least one academic year profile code defined to import ISIRs. You may also want to set up your budget codes.
If you import large numbers of ISIRs into Packaging, you may want to consider assigning your budgets at a later time in order to speed up the import process.

Values for the ISIR field “Interested in Work-Study?” are imported as follows:
- If the “Interested in Work-Study?” ISIR response is 1, the “Interested In: Employment” checkbox on the Awards tab is selected.
- If the “Interested in Work-Study?” ISIR response is 2, 3, or blank, the “Interested In: Employment” checkbox on the Awards tab remains cleared.

The “Interested In: Student Loans” field on the Awards tab is not updated by importing ISIRs into Packaging. You can update the checkbox manually on the Awards tab, by using Packaging multiple entry, or by importing a Packaging External Add or External Change file.

Importing External Records

You can import records from your school’s external system into EDExpress to establish student financial aid records. To use the Import External Add or Change function, you must first create an input file according to the specifications provided in the Packaging Technical Reference, which is available in Adobe PDF format from the U.S. Department of Education’s Federal Student Aid Download (FSAdownload) Web site, located at fsadownload.ed.gov.

If more than one record with the same Social Security Number (SSN) exists in an external add file, only the first record is imported. Duplicate records are skipped. The External Add Import Records Edit Report lists any records that were not imported.

To import external records from your school system:

1. If you added new external Packaging data files to your default import directory, the Pending Imports pane of the EDExpress Desktop displays the available import files. To use the Pending Imports pane option to import external files into Packaging, click the Import button under the import file. Otherwise, select File, Import from the menu bar, then choose Packaging.

2. If needed, click the down arrow next to Import Type, then click Packaging Data–External Add, Packaging Data–External Change, or Packaging Data–Add Fund Amounts.

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add</td>
<td>This option enables you to add packaging records to the Packaging database.</td>
</tr>
<tr>
<td>Change</td>
<td>This option enables you to modify specific fields on an existing packaging record on the Packaging database.</td>
</tr>
<tr>
<td>Add Fund Amounts</td>
<td>This option enables you to update Fund awards on a student record by importing from an external file.</td>
</tr>
<tr>
<td>Report to</td>
<td>This option enables you to view, print, or send the output document to a file to be retained at your school.</td>
</tr>
<tr>
<td>Parameter</td>
<td>Description</td>
</tr>
<tr>
<td>-----------------------------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td><strong>Password and Verify Password</strong></td>
<td>Enter the same password in both fields to apply password protection to your import edit report if you are printing to a file. EDExpress saves the password-protected file it creates in PDF format in the destination folder.</td>
</tr>
<tr>
<td><strong>Print a list of imported packaging records?</strong></td>
<td>This option enables you to print a listing of records added during the Import External process.</td>
</tr>
<tr>
<td><strong>Print Successfully Imported Funds?</strong></td>
<td>This option enables you to print successfully imported funds. Select this checkbox to print the Funds Imported Report upon completion of the import process.</td>
</tr>
</tbody>
</table>

3. Click **OK**.

**Important Note**

- **New for 2018-2019!** The EDExpress import process now archives imported data files automatically, storing the files in a compressed, password-protected ZIP file called Backup#.zip (where # is a number from 0-9 that is incremented each time the previous numbered backup file reaches 2 gigabytes or more in size). Archive files are stored in your default import data directory (as specified in File Management setup) and are accessible from the import dialog box by clicking the **Archived File** button. For more information, see the “Import from Archive dialog box” help topic in EDExpress.
The Package, Unpackage, and Repackage Processes

The Basic Processes
The Package, Unpackage, and Repackage processes are available in two different modes.

Single Student
Use this method to package, unpackage, or repackage a student’s record with the student’s record open.

To package, unpackage, or repackage an individual student record:
1. Open the student’s record in EDExpress.
2. Click the student’s Awards tab.
3. Select Process from the menu bar, then choose Package, Unpackage, or Repackage.

Multiple Students
Use this method to package, unpackage, or repackage a group of student records by selecting Process, Package from the menu bar, then choosing Selection Criteria. You can also use the Sort By option to sort the records you selected to package. When the process is complete, EDExpress asks if you would like to print a list of packaged students. The list includes the student’s name and Social Security Number (SSN).

To package, unpackage, or repackage a group of students:
1. With records closed, select Process from the menu bar, then choose Package, Unpackage, or Repackage.
2. Use selection criteria to specify a group of students to package.
3. Use the Sort By option to prioritize the students in your selected group. Click Help for more information.
4. Click OK.

Note: You can also package, unpackage, or repackage a single student from outside the student’s record by following the steps above and using selection criteria to select an individual student.

**Package**

The Package process creates a student financial aid package for a student or a group of students in your Packaging database.

**Important Note**

- Note the current Packaging Status field in the upper right corner of the screen:
  - H = Hand Packaged
  - M = Manually Adjusted Package
  - N = Not Ready to Package
  - P = Packaged
  - R = Ready to Package
  - U = Unpackaged

**Unpackage**

The Unpackage process reverses the Package process. It performs these actions:

- Returns all monies to the funds from which they originated in Fund Maintenance, except for the funds awarded as Outside Resources, Aid Type O. These funds (which are often awarded by hand) remain awarded to the student and are not returned to Fund Maintenance.
- Changes the packaging status to U.

**Important Notes**

- The Unpackage process returns awarded funds to the fund accounts you established in Fund Maintenance. Note that awarded funds marked “Do not remove if unpackaged?” are retained on the student record.
- Do not use selection criteria if you want to unpackage all of your packaged records.
- After unpackaging a student, the status flag is changed from P (Packaged), H (Hand Packaged), or M (Manually Adjusted Package) to U (Unpackaged).
Repackage

The Repackage process recomputes the entire financial aid package of individual students or groups of students based on changes to their demographic information, financial data, award methodology, or fund values.

**Important Note**

- To repackage records, the packaging status must be P (Packaged), H (Hand Packaged), or M (Manually Adjusted Package).
Printing Reports

Print Award Letters

In EDExpress, you can print two types of award letters:

- **Financial Aid Award Offer**: Students return this letter to the financial aid office if they want to accept part or all of the award.

- **Financial Aid Award Notification**: Students do not need to return this letter to the financial aid office if they accept the total award. This letter still gives the student the option to decline part or all of the award by marking the declined fund and returning the award letter.

Award letters can be printed for a single student or a group of students.

Since the student’s Social Security Number (SSN) is excluded from e-mailed letters for security reasons, the **Exclude SSN?** checkbox is automatically selected and unable to be cleared (unless you select a different print option) when you choose **E-mail** as the letter destination on the Print dialog box.

In Global System setup, you can choose to use the student’s E-mail Address 1 or E-mail Address 2 on reports that can be e-mailed directly to students, such as document tracking letters and award letters. E-mail Address 1 is the default value. You can change this setting in the Print dialog box for a specific print job at any time, but the default setting remains the same until you change it in Global System setup.

**New for 2018-2019!** EDExpress now creates and stores all reports and lists in Adobe Portable Document Format (PDF). You are not required to have Adobe software installed on your PC workstation to print or view EDExpress reports. However, you must have Adobe Reader (free software) or Adobe Acrobat (licensed software) and either product’s associated Web browser plug-ins installed to use the Screen print option in EDExpress. If you do not have any Adobe products installed on your PC and you print a report to the Screen, EDExpress displays a warning message indicating it was unable to locate the appropriate Adobe browser plug-in and offers the option of saving the report or attempting to open the report using your operating system’s default viewer application.

**New for 2018-2019!** You can now apply password protection to EDExpress reports and lists you print to a file. To use this new functionality, select File as the report destination, then enter
the same password in the **Password** and **Verify Password** fields. EDExpress saves the password-protected file it creates in PDF format in the destination folder.

**New for 2018-2019!** You can now indicate EDExpress reports you print frequently as “favorites” by clicking the star icon to the right of the report type in the Print dialog box. Reports marked as favorites appear automatically in the Favorites section of the EDExpress desktop, which allows you to access the print functionality for the report more quickly. To remove the designation of a report as a favorite, return to the Print dialog box for the report and click the star icon again. If you want to remove all reports designated as favorites from the EDExpress desktop, go to **View, Desktop Settings** and click **Clear Favorites**.

**To print award letters:**

1. Select **File, Print** from the menu bar, then choose **Packaging**.
2. Click the **down** arrow next to Report and select **Letters–Award**.
3. Click **Single** to print a letter for a single student; click **Multiple** to print a letter for a group of students.
4. Click **Printer**, **File**, **Screen**, or **E-mail** for the output destination. If you print to the screen, the letter count is not affected. If you want to send the report to a file, click the **File** button and type a name for the file, then click **Save**.
5. (Optional) If you are printing to a file and want to password-protect the file, enter the same password in the **Password** and **Verify Password** fields. The export file will be saved in encrypted PDF format.
6. (Optional – Multiple print only) Click the **File** button to select an SSN file you created previously or click the **ellipsis (…)** button in the SSN File section of the dialog box to enter a list of trankeys for records you want to update. See Help for information about creating SSN files.
7. Enter the following values:

<table>
<thead>
<tr>
<th><strong>Parameter</strong></th>
<th><strong>Description</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Enter SSN</td>
<td>(Single option only) This field is the SSN of the student who will be receiving the letter.</td>
</tr>
</tbody>
</table>
| Address       | This field specifies the address you want to use. The information is taken from the Demo tab.  
In Global System setup, you can choose to use the student’s permanent or local address on all printed items that include the student’s address, such as mailing labels. The student’s permanent address is the default value. You can change this setting in the Print dialog box for a specific print job at any time, but the default setting remains the same until you change it in Global System setup. |
<p>| Sort Order    | (Multiple option only) This field specifies the order in which the letters will print. Sort order options are Last Name, SSN, or Zip Code. |</p>
<table>
<thead>
<tr>
<th>Parameter</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Acceptance Date</strong> <em>(Offer Letter)</em></td>
<td>This date is the date by which you want the student to respond to the award package. This date is printed on the award letter. The acceptance date is not available for notification letters (this option is dimmed on the screen), but is required for offer letters.</td>
</tr>
<tr>
<td><strong>Exclude Heading from Letter?</strong></td>
<td>This option omits the heading “Financial Aid Award Notification XXXX-XXXX Award Year” from the award letter.</td>
</tr>
<tr>
<td><strong>Exclude Records with Award Letter Received?</strong></td>
<td>(Multiple option only) This checkbox prevents printing award letters already marked as received.</td>
</tr>
<tr>
<td><strong>Exclude Needs Analysis?</strong></td>
<td>This option omits the needs analysis detail from the award letter.</td>
</tr>
<tr>
<td><strong>Print User Defined Text?</strong></td>
<td>This option prints the text you set up in User-Defined User Letter Text setup.</td>
</tr>
<tr>
<td><strong>Print Missing Documents?</strong></td>
<td>This option prints a list of requested documents missing or incomplete from the student’s file.</td>
</tr>
<tr>
<td><strong>Exclude Signature?</strong></td>
<td>This option omits the signature block on the award letter.</td>
</tr>
<tr>
<td><strong>Exclude SSN?</strong></td>
<td>This option excludes the student’s Social Security Number (SSN) from the award letter. If you do not select this checkbox, EDEExpress masks the first five digits of students’ SSNs with Xs and displays only the last four digits (such as XXXXX9999).</td>
</tr>
<tr>
<td><strong>Print School Name/Address?</strong></td>
<td>This option is selected automatically by EDEExpress. By clearing this checkbox, you are indicating you do not want the school’s name and address to print on the award letter.</td>
</tr>
<tr>
<td><strong>Print Financial Aid Shopping Sheet?</strong></td>
<td>This option enables you to print the student’s Financial Aid Shopping Sheet along with the award letter. You must already have created a record for the student on the Financial Aid Shopping Sheet dialog box <em>(Tools, Financial Aid Shopping Sheet)</em> for the document to print. You can only use this option if the Report File Destination is printer or screen. You should ensure the award amounts listed on the award letter and Financial Aid Shopping Sheet match before providing both to your students to avoid inquiries about discrepancies. For more information on the Financial Aid Shopping Sheet, see the appendix of this desk reference.</td>
</tr>
</tbody>
</table>

8. Click the **Selection Criteria** button (Multiple option only) if you want to narrow the number of records you want to work with.

9. Click **OK**.
Print FISAP Reports in Packaging

The EDExpress Packaging module enables you to print detailed reports of student information in your Packaging database that can help you prepare different sections of the FISAP (Fiscal Operations Report and Application to Participate for Funds). The reports distinguish between dependent or independent students pursuing an undergraduate/baccalaureate degree who already have a prior degree and those who do not have a prior degree.

The FISAP–Eligible Dependent Students and FISAP–Eligible Independent Students reports in EDExpress use income ranges that correspond to Part II, Section F of the FISAP. The FISAP–Dependent Student Summary and FISAP–Independent Summary reports use income ranges that correspond to the Income Grid section of the Program Summary (Part VI) portion of the FISAP.

To print the EDExpress Packaging FISAP reports:

1. Select File, Print from the menu bar, then choose Packaging.

2. Click the down arrow next to Report and select FISAP–Eligible Dependent Students, FISAP–Eligible Independent Students, FISAP–Dependent Student Summary, or FISAP–Independent Summary.

   Note: Only schools that use the Packaging module to package student records will be able to generate reports sorted by program type (Perkins, FSEOG, and Federal Work-Study) for the Program Summary (Part VI) portion of the FISAP.

3. Click Printer, File, or Screen as the output destination. If you want to send the report to a file, click the File button and type a name for the file, then click Save.

   If you chose File as your output destination, no paper copy is printed (the information is printed to the file in PDF format). To print a paper copy, locate the file, open it using a PDF-compatible program such as Adobe Reader, and print it.

   You can also password-protect import reports printed to a file by entering a password in the Password and Verify Password fields. The printed file is encrypted in PDF format. To print a paper copy, repeat the print process and select Printer as your output destination.

   If you chose Screen as your output destination, no paper copy is printed (the information is printed to your screen). Use the scroll bars to view the report and click Close when you are finished. To print a paper copy, click the Print button to print from the screen. You can also click the Save button to retain a copy of the report in PDF format.

4. Select the Print Details? checkbox for a student-by-student listing of records included in the report.

5. Click OK.
**Important Notes**

- If you package a student but the student does not attend your school, unpack and delete that student’s packaging record so that the student is not included in the FISAP report data you print in EDExpress.

- If you do not use Packaging, you need to set up a basic academic year profile and budget and import ISIRs into the Packaging module before you can use the FISAP reports in the Packaging module. Refer to the EDExpress Help topic “Set Up Packaging to Print FISAP Reports” for additional guidance.

- Keep in mind that when you request funds for 2018-2019, you will report student information for the 2016-2017 award year, so make sure you print FISAP information from the correct version of EDExpress.

- For further information on completing the FISAP, see the FISAP Form and Instructions on the IFAP Web site.
Print Lists

Using this option, you can print a variety of lists and other items. These include:

**Lists**
- List–Fund Maintenance
- List–Students by Fund Code
- List–Packaged Students
- List–Unpackaged Students
- List–Entered Packaging Records
- List–Packaging Setup
- List–Funds Forecast

**Other Items**
- Packaging Record
- Measurement Tools–Funds
- Record Layout–User Defined Formats
- Student Summary

To print lists:
1. Select **File, Print** from the menu bar, then choose **Packaging**.
2. Click the down arrow next to Report and select the item that you want to print.
3. Click **Printer, File, or Screen** as the output destination. If you want to send the report to a file, click the **File** button and type a name for the file, then click **Save**.

If you chose **File** as your output destination, no paper copy is printed (the information is printed to the file in PDF format). To print a paper copy, locate the file, open it using a PDF-compatible program such as Adobe Reader, and print it.

You can also password-protect import reports printed to a file by entering a password in the **Password** and **Verify Password** fields. The printed file is encrypted in PDF format. To print a paper copy, repeat the print process and select **Printer** as your output destination.

If you chose **Screen** as your output destination, no paper copy is printed (the information is printed to your screen). Use the scroll bars to view the report and click **Close** when you are finished. To print a paper copy, click the **Print** button to print from the screen. You can also click the **Save** button to retain a copy of the report in PDF format.
4. (Optional – Multiple print only for specific reports) Click the **File** button to select an SSN file you created previously or click the **ellipsis (…)** button in the SSN File section of the dialog box to enter a list of trankeys for records you want to print. See Help for information about creating SSN files.

5. Depending on the item you selected, select the remaining options available to you on the screen.

6. (Optional) Click **Selection Criteria** to select specific records or to use a query to select a group of records.

7. Click **OK**. If you chose Screen as your output destination, use the **scroll bars** to view the list. Click **Close** when you have finished.

**Important Notes**

- **New for 2018-2019!** EDExpress now creates and stores all reports and lists in Adobe Portable Document Format (PDF). You are not required to have Adobe software installed on your PC workstation to print or view EDExpress reports. However, you must have Adobe Reader (free software) or Adobe Acrobat (licensed software) and either product’s associated Web browser plug-ins installed to use the Screen print option in EDExpress. If you do not have any Adobe products installed on your PC and you print a report to the Screen, EDExpress displays a warning message indicating it was unable to locate the appropriate Adobe browser plug-in and offers the option of saving the report or attempting to open the report using your operating system’s default viewer application.

- **New for 2018-2019!** You can now apply password protection to EDExpress reports and lists you print to a file. To use this new functionality, select **File** as the report destination, then enter the same password in the **Password** and **Verify Password** fields. EDExpress saves the password-protected file it creates in PDF format in the destination folder.

- **New for 2018-2019!** You can now indicate EDExpress reports you print frequently as “favorites” by clicking the star icon to the right of the report type in the Print dialog box. Reports marked as favorites appear automatically in the Favorites section of the EDExpress desktop, which allows you to access the print functionality for the report more quickly. To remove the designation of a report as a favorite, return to the Print dialog box for the report and click the star icon again. If you want to remove all reports designated as favorites from the EDExpress desktop, go to **View, Desktop Settings** and click **Clear Favorites**.
Exporting Packaging Data

Packaging Export
EDExpress enables you to export Packaging data to an external system.

New for 2018-2019! We updated the Export dialog box in each EDExpress module to add a password protection option for export files for additional security. To use this optional feature, enter and verify a password value in the Password and Verify Password fields in the Export dialog box prior to initiating the export. The exported file is saved in encrypted ZIP format. The password protection option is only available in the export dialog box for external exports; you cannot apply encryption to export types that are intended for transmission to Federal Student Aid data processors.

To export Packaging data:
1. Close any records that are open.
2. Select File, Export from the menu bar, then choose Packaging.
3. Confirm that Packaging Data appears in the Export Type field. The default path and file name appear in the Export To field.
4. If you want to export using a different file name, click the File button and type a name for the file, then click Save.
5. (Optional) If you want to password-protect your export file, enter the same password in the Password and Verify Password fields. The export file will be saved in encrypted ZIP format.
6. Select the export status.

Note: When you create a packaging record, the display-only External Export flag on the Awards tab is set to Y, indicating that the record can be exported in an External Export file. Selecting Y as the Export Status exports packaging records that have Y as the External Export flag. If the packaging record is not complete, or if you have previously exported the packaging record, the External Export flag is set to N.
Selecting N as the Export Status exports packaging records that have N as the External Export flag. Selecting Both exports packaging records with either Y or N as the External Export flag. If you make changes to a student’s packaging record that has N as the External Export flag, the External Export flag changes back to Y.

6. Select the delimiter type.

7. Type the format code in the Format Code field, or click the ellipsis (…) button to select from a list of format codes.

8. (Optional) Click Selection Criteria to narrow the group of records you want to export. When you are finished, click OK.

9. Click OK to export the data. EDExpress exports the file to the file shown in the Export To field, and an In Progress dialog box appears.

10. Click OK to close the In Progress dialog box when the export is finished.

**Important Notes**

- To use the Export feature in Packaging, you must establish a file format. See the topic “File Formats (Packaging)” in the EDExpress Help for more information.
- The default export message class is PKEX19IN.
Query

Rules for Queries

A query is a set of criteria that describes a particular student population. Queries are used in functions like Print and Export to select specific groups of student records from all records in the database. Some queries have fixed values, and for others you can enter different values each time you use the query.

Queries are specific to individual modules, so you must create your queries in the modules in which you intend to use them. For example, if you need a query to use when printing a list of ISIRs, you must create the query in the App Express module.

When creating your own queries, consider these basic rules:

- Queries are processed from left to right, or beginning to end; however, AND is applied first, even if it appears after OR in the query statement.
- Parentheses change the order of precedence. Expressions enclosed in parentheses are processed before AND and OR. In the case of nested expressions, innermost parentheses are processed first. See the topic “Using Parentheses” in Help for more information.
- Both segments of the query connected by AND must be true for a record to be selected.
- Only one of the segments connected by OR must be true for a record to be selected.

Helpful Hints!

- New for 2018-2019! If you want to test a new query you have created, save the query, then click the new Preview button. If you are testing a parameter query, enter the values you want to query when prompted. EDExpress displays the records that meet the query criteria that are currently in your database.
- New for 2018-2019! We updated the Current Date query option to enable you to specify a number of days, weeks, months, or years before or after the current date to include in the query results. To use this feature when querying on a date field, select Current Date in the Value section, select the plus (+) or minus (-) sign to indicate a data range after or before the current date, respectively, enter a number of measurement, then select Days, Weeks, Months, or Years as a unit of measurement.
For example, to query on students who filed an application in the last six months, create a query on the **Application Receipt Date** field, select **Current Date** for the Value, select the **minus** (-) sign, enter **6** for the number, and select **Months** for the unit of measurement.

- If you access Multiple Entry from a query in the Queries pane of the EDExpress Desktop, the criteria for the Multiple Entry function is limited automatically to the records meeting the query you selected in the pane. The Selection Criteria and SSN File buttons are disabled. To use different selection criteria for the Multiple Entry function, click **Cancel** on the Multiple Entry dialog box and access the Multiple Entry function from the Process menu.

- Select the **Field to Field Comparison** checkbox to build a query that compares numeric fields within one record. For example, if a student has two ISIR transactions, a field-to-field query in App Express compares the numeric fields in the 01 transaction only with the other numeric fields in the 01, not with the numeric fields in the 02. This option is not available if you selected Prompt at Execution or Current Date. See “Field to Field Queries” in this desk reference for examples.

- Select **Help, Help Topics** from the menu bar, then choose **Contents, Query, Dialog boxes, Query dialog box** for information about:
  - Query dialog box
  - Query Grid dialog box
  - Parameter Query Entry dialog box
  - View Query dialog box
Creating a Query

For information about creating complex queries with nested expressions, see the topic “Rules for Queries” in Help.

To create a query:
1. Select Tools, Query from the menu bar.
2. Click the tab of the module for which you want to create the query.
3. Click Add.
4. Type a descriptive title for the query. The title can consist of up to 50 uppercase letters, lowercase letters, numbers, and spaces.
5. Select a field from the Query Fields list. You can type the first letters of a field to find the field name that begins with those letters.
6. Click the down arrow in the Operator field to select an operator.
7. Type a value for the field. Click the Value Help button to see the valid values for the field.
   Tip: If you want to be prompted for a value at the time you use the query, do not specify a value for the query statement. Instead, select the Prompt at Execution checkbox. Note that Prompt at Execution queries cannot be used with Packaging setup.
8. Click the Append button to add the query statement to the Criteria field.
9. (Optional) Click the And button or the Or button to add another statement to the query.
10. Repeat steps 5 through 9 until you have added all statements for the query, then continue with step 11.
11. Click Save to save the query.
12. (Optional) If you want to test your query, click Preview to view all the records in your database that meet the query criteria.
13. Click OK to close the Query dialog box or click Add to create another query.
Creating a Query from a Predefined Query

EDExpress comes with a set of predefined queries commonly used in EDExpress modules. Wherever the Selection Criteria option is available in EDExpress, you can use these queries to identify groups of records. See “Using a Query” in this desk reference for more information.

You can also use predefined queries as templates to create your own queries.

When you open Query for the first time, you will see that the predefined queries are stored as the first set of records in the Query database. You will know a query is predefined if the Query Title is PREDEFINED QUERY.

Use the Query function to create queries that are most useful to your school and the way you process data.

To create a query from a predefined query:

1. Select Tools, Query from the menu bar.
2. Click the tab of the module for which you want to create the query.
3. Click the Retrieve button. Use the arrow buttons in the database buttons box to locate the predefined query you want to use for a template. Click OK.
4. Type a new title for the query. You can modify and save a predefined query only if you rename it.
5. To delete a line, select the line and click Remove. To add a new line, select the line in the Criteria field above where you want to add the new line. Specify the Field, Operator, and Value for the new line, then click Append. Use the other buttons located to the right of the Criteria field to fine-tune the query statement, if necessary.
6. Click Save to save the query. Click OK.
7. Click OK to close the Query dialog box or click Add to create another query.

Important Note

- Parameter (Prompt at Execution) queries cannot be used with Packaging setup (for example, Fund Maintenance and Award Methodology).
Modifying a Query

To modify a query:

1. Select Tools, Query from the menu bar.
2. Click the tab of the module for the query you want to modify.
3. Click the Retrieve button. Use the arrow buttons in the database buttons box to locate the query you want to modify.
4. Modify the query. Click any criteria line to select it and change the Field, Operator, or Value. Then click the Change button. You can also delete lines or add new lines to the query.

   To delete a line, select the line and click Remove. To add a new line, select the line in the Criteria field above where you want to insert the new line. Specify the Field, Operator, and Value for the new line, then click Append. Use the other buttons located to the right of the Criteria field to fine-tune the query statement, if necessary.

5. Click Save to save the query. Click OK.
6. Click OK to close the Query dialog box.
Using a Query

You can use queries in any function where you see a Selection Criteria button, such as when you are printing lists, importing ISIR data into Packaging, exporting packaging data, using multiple entry, and packaging, unpackaging, and repackaging student records.

New for 2018-2019! You can also now use queries in the Student Search menu of the toolbar to open sets of student records, as well as designate specific queries for regular monitoring via the Queries Pane of the EDExpress Desktop.

To use a query:

1. Click the Selection Criteria button.
2. Click the ellipsis (...) button next to the Query Title field to display a list of queries. The Query Grid dialog box appears.
3. Click the query you want to use to select it.
   - If the Parameter Query column is not selected, click OK. EDExpress returns you to the Selection Criteria dialog box and enters the title of the query in the Query Title field. Skip to step 8.
   - If the Parameter Query column is selected, click OK. EDExpress returns you to the Selection Criteria dialog box and enters the title of the query in the Query Title field. Click OK again and the Parameter Query Entry dialog box appears.
4. Click in the Field Value column next to each Field Name and type a valid value. Click the Value Help button to see a list of valid values.
   - If you leave a value blank, EDExpress automatically enters NULL as the value. When you run the query, records that contain NULL for that field value are selected.
5. Click the View Query button to see the completed query. Review the query carefully to be sure you have entered the correct values for each field.
6. Click Close to return to the Parameter Query Entry dialog box.
7. Click OK to save your entries.
8. Click OK to run the query. An In Progress dialog box displays the progress of the process.
9. Click OK to clear the In Progress dialog box.
Sample Queries

Here are three examples of queries that you can use in processing your students’ financial aid data. See “Using a Query” for instructions on how to use these queries.

Sample 1

Dependent students from New Mexico whose parents’ number in college is greater than 1 or whose adjusted gross income is less than $25,000.

Click the Application Processing tab.

((DEPENDENCY STATUS = ‘D’) AND
(STUDENT’S STATE OF LEGAL RESIDENCE = ‘NM’)) AND
((PARENTS’ NUMBER IN COLLEGE > ‘1’) OR
(PARENTS’ ADJUSTED GROSS INCOME < ‘25000’))

Sample 2

Graduate students under 2000 EFC who are not packaged

Click the Packaging tab.

(EFC-PACKAGING < 2000) AND
((COLLEGE GRADE LEVEL-PACKAGING = ‘6’) OR
(COLLEGE GRADE LEVEL-PACKAGING = ‘7’)) AND
((PACKAGING STATUS = ‘N’) OR
(PACKAGING STATUS = ‘R’) OR
(PACKAGING STATUS = ‘U’))

Sample 3

Independent students assigned documents required for packaging and/or verification.

Click the Packaging tab.

((DOCUMENT STATUS = ‘P’) OR
(DOCUMENT STATUS = ‘V’) OR
(DOCUMENT STATUS = ‘B’)) AND
(DEPENDENCY STATUS = ‘I’)
Field to Field Queries

The Field to Field option helps you build a query that compares numeric fields within one record. For example, if a student has two ISIR transactions, a field to field query compares the numeric fields in the 01 transaction only with the other numeric fields in the 01, not with the numeric fields in the 02. This option is not available if you marked Prompt at Execution or Current Date.

Examples of Field to Field Queries

As an example of how to use this function, you can query on taxes paid as a percentage of AGI. The statement would look something like this:

PARENTS’ U.S. INCOME TAX > PARENTS’ ADJUSTED GROSS INCOME * 0.10 (or other decimal for the percentage you choose)

More examples:

PARENT 1’S INCOME EARNED FROM WORK > PARENTS’ ADJUSTED GROSS INCOME

PARENT 2’S INCOME EARNED FROM WORK > PARENTS’ ADJUSTED GROSS INCOME

STUDENT’S INCOME > STUDENT’S ADJUSTED GROSS INCOME

STUDENT’S U.S. INCOME TAX PAID > STUDENT’S ADJUSTED GROSS INCOME * 22 (or other decimal for the percentage you choose)
Deleting a Query

To delete a query:

1. Select **Tools, Query** from the menu bar.
2. Click the tab of the module for the query you want to delete.
3. Use the arrow buttons in the database buttons box to locate the query you want to delete. You cannot delete predefined queries.
4. Click **Delete** in the database buttons box. EDExpress asks you to confirm that you want to delete the query.
5. Click **Yes** to delete the query.
6. Click **OK** to continue.
Using the EDExpress Desktop Queries Pane

New for 2018-2019! The Queries pane of the EDExpress Desktop enables you to select module-specific predefined or custom queries from Query setup, view the current number of student records in your database meeting each query’s criteria, and quickly access software functions for the records where applicable, such as opening the records as a group or initiating the multiple entry or browse dialog boxes.

Query results display in the pane and refresh both at regular intervals and upon each new startup of the software. As results update, you can use the incoming information to identify database records requiring further attention, and to drive your office’s workflows.

The module-specific predefined or custom queries you select for the Queries pane must already exist in Query setup (Tools, Query). You can also select predefined queries that are available automatically in EDExpress 2018-2019. See “Creating a Query” and “Creating a Query from a Predefined Query” earlier in this sub-section for guidance on creating queries.

To add a query to the Queries Pane:

1. Click the Settings button in the top right corner of the Queries pane in the EDExpress desktop.

2. Click Add to add a new query to the Queries pane. You can also click Retrieve if you want to select and modify the settings for a query you added to the pane previously.

3. Click the down arrow next to Query System to select the module associated with the query you want to select. For Release 1.0, you can select Global, Application Processing, or Packaging.

4. Click the down arrow next to Record Type and select a value associated with the Query System you chose in step 2. The Record Type identifies the database table within the module that should be queried against, which affects the Record Count value displayed in the Queries pane, determines the columns that are displayed if you click the Browse button under the query in the Queries pane, and determines the records that are opened.

The available record types are determined by the Query System value you select. For Global, you can only select Demographic (which displays fields from the Demo tab). For Application Processing, you can select Demographic or ISIR (which displays ISIR fields). For Packaging, you can select Demographic, Student (which displays fields from the Packaging record), Fund (which displays packaging funds assigned to packaging records), or Terms (which displays terms assigned from Academic Year Profiles).

See the “Important Notes” section below for additional guidance on using record types.

5. Click the down arrow next to Title and select the query you want added to the Queries pane. The query must exist in Query setup (Tools, Query).

6. (Optional) Update the Query Title if you want to display a more descriptive and unique label in the Queries pane. For example, if you using the predefined College Grade Level
parameter query in the Application Processing module and you indicate you want to query for records with a value of 2 (2nd Year/sophomore), you may want to use a Query Title value of “Sophomores.”

7. If you selected a parameter query in step 5, click the **Parameter…** button to enter a field value for the iteration of the query that will display in the Queries panel.

8. Click **Save** to add the query to the Queries panel.

**Important Notes**

- You can add the same custom or predefined query to the Queries panel multiple times. For example, you may want to display Application Processing queries associated with different ISIR processed date ranges, last name ranges, college grade levels, housing plan responses, states of legal residence, etc.

- The Count value for each query in the Queries pane is updated dynamically by EDExpress based on the refresh rate you select in the desktop settings (**View**, **Desktop Settings**).

- When viewing query results in the Queries pane, be aware that the Count value can vary for the same query based on the Record Type field value you select in the Query Settings dialog box.

For example, each student record in EDExpress can only have one demographic record, but each student record can have multiple ISIR transactions. If you select **Demographic** for the Record Type field value associated with an Application Processing query, each student record meeting the query is only counted once in the Queries pane, regardless of the number of ISIR transactions the student has that meet the criteria. However, if you select **ISIR** as the Record Type field value for the same query, the Count value in the pane reflects all the ISIR transactions that meet the query criteria.

As such, if you have five students with five ISIR transactions each that meet the Application Processing query criteria, the **Demographic** Record Type displays a Count value of 5, while the **ISIR** Record Type displays a Count value of 25.

This example also applies to Packaging queries and associated record types. Each student record in EDExpress can only have one Packaging record, but can be assigned multiple funds and terms (the latter via Academic Year Profile codes, which can have up to five individual terms defined). Therefore, selecting **Student** as the Record Type field value only counts each student record meeting the query once, whereas selecting **Fund** or **Terms** as the Record Type field value can result in a Count value in the pane that reflects multiple results for the same student record.

- The Record Type field value you select for a query in the Query Settings dialog box also affects which tab is opened when you click the **Open** button under the query in the Queries pane. For example, for Application Processing queries, if the Record Type field value is **Demographic**, records are opened to the Demo tab. If the Record Type field value is **ISIR**, records are opened on the ISIR Review tab.
• The Multiple Entry option is available for Global and Packaging queries added to the Queries pane in Release 1.0.

• If you want to remove a specific query from your Queries pane, locate the query in the Query Settings dialog box and click the **Delete** button. This action only removes the query from the pane – the query remains available for use in selection criteria for specific EDExpress functionality. If you want to clear all queries from the Queries pane, click **Clear Queries** in desktop settings (**View**, **Desktop Settings**).

• The security group associated with a user ID in EDExpress Security Users setup (**Tools**, **Setup**, **Global**, **Security Users**) must have access to opening student records, using multiple entry, and browsing records for associated buttons to appear under applicable queries in the pane.

• If you access Multiple Entry from a query in the Queries pane, the criteria for the Multiple Entry function is limited automatically to the records meeting the query you selected in the pane. The Selection Criteria and SSN File buttons are disabled. To use different selection criteria for the Multiple Entry function, click **Cancel** on the Multiple Entry dialog box and access the Multiple Entry function from the Process menu.
# Bits and Bytes

## Message Classes (Sent by CPS)

<table>
<thead>
<tr>
<th>Data Type</th>
<th>Message Class</th>
<th>Data Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Daily</td>
<td>IDAP19OP</td>
<td>Daily ISIRs that are the result of application records submitted by your school</td>
</tr>
<tr>
<td>Daily</td>
<td>IDSA19OP</td>
<td>Daily ISIRs that are generated for all schools listed on the record</td>
</tr>
<tr>
<td>Daily</td>
<td>IDRE19OP</td>
<td>Daily ISIRs for State Agency residents</td>
</tr>
<tr>
<td>Daily</td>
<td>IDNR19OP</td>
<td>Daily ISIRs for State Agency non-residents</td>
</tr>
<tr>
<td>CPS Pushed</td>
<td>IGCO19OP</td>
<td>Daily ISIRs that are the result of correction records submitted by your school</td>
</tr>
<tr>
<td>CPS Pushed</td>
<td>IGSA19OP</td>
<td>Pushed automatic ISIRs that are generated for all schools listed on the record except the school that submitted the correction</td>
</tr>
<tr>
<td>CPS Pushed</td>
<td>IGSG19OP</td>
<td>Pushed ISIRs generated for all schools listed on the record that are a result of system-generated processing by the CPS</td>
</tr>
</tbody>
</table>

Note: IGSG files are sent to schools when new transactions are system-generated by the CPS for circumstances such as reprocessing, NSLDS post-screening, or Department of Homeland Security (DHS) automated secondary confirmation.
#### Message Classes (Sent by CPS) (Continued)

<table>
<thead>
<tr>
<th>Data Type</th>
<th>Message Class</th>
<th>Data Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>CPS Pushed</td>
<td>IGRE19OP</td>
<td>Pushed ISIRs for State Agency residents</td>
</tr>
<tr>
<td>CPS Pushed</td>
<td>IGNR19OP</td>
<td>Pushed ISIRs for State Agency non-residents</td>
</tr>
<tr>
<td>Requested</td>
<td>ISRF19OP</td>
<td>ISIRs requested directly from the ISIR Datamart</td>
</tr>
<tr>
<td>Errors</td>
<td>EAPR19OP</td>
<td>Error records from processing of application data</td>
</tr>
<tr>
<td>Errors</td>
<td>CORE19OP</td>
<td>Error records from processing of correction data</td>
</tr>
<tr>
<td>Errors</td>
<td>SIGA19OP</td>
<td>Error records from processing of signature records</td>
</tr>
</tbody>
</table>

**Helpful Hint!**

For CPS-related record layouts, see the *EDE Technical Reference*, which is available for download in Adobe PDF format from the U.S. Department of Education’s Federal Student Aid Download (FSAdownload) Web site, located at [fsadownload.ed.gov](http://fsadownload.ed.gov).
Downloading EDExpress Software and Documentation

EDExpress 2018-2019, Release 1.0, is distributed on the Internet. You can download the software and the related user documentation in Adobe PDF format from the U.S. Department of Education’s Federal Student Aid Download (FSAdownload) Web site, located at fsadownload.ed.gov.

The following types of documentation are available to download for EDExpress:

- EDExpress for Windows 2018-2019 Cover Letters
- EDExpress for Windows 2018-2019 Installation Guide
- EDExpress for Windows 2018-2019 Desk References
- 2018-2019 EDExpress Packaging Technical Reference
- 2018-2019 Electronic Data Exchange (EDE) Technical Reference

Instructions for downloading EDExpress software and documentation are located in the “Downloading Documentation from the FSAdownload Web Site” section of the EDExpress for Windows 2018-2019 Installation Guide. The amount of time it takes to download a file depends on the file size and the speed of your Internet connection.

If you experience difficulties with the EDExpress 2018-2019, Release 1.0 software, contact CPS/SAIG Technical Support at 800/330-5947 (TDD/TTY 800/516-5806), or by e-mail at CPSSAIG@ed.gov.

Important Note

- Some organizations block their employees’ ability to download software from the Internet. If you have trouble downloading EDExpress, try again later. If you are still unable to download, contact your technical support staff to ensure you have full download rights.
Getting Help

Help System

General help is available from the menu bar within EDExpress. You can view the main list of help topics by selecting Help, Help Topics, Contents from the EDExpress menu bar. Use the Search tab on the Help screen to locate specific words or phrases anywhere within Help. Also, field help is available by selecting a field and pressing the F1 key.

Helpful Hints!

- Open the Help Contents books to access Help topics. Each book contains several individual Help topics.
- Check the How Do I? topics for frequently performed procedures by selecting How Do I? from the Help menu.
CPS/SAIG Technical Support

For questions regarding technical assistance and software functionality, call CPS/SAIG Technical Support at:

800/330-5947
TDD/TTY: 800/516-5806

Customer service representatives are available 8 a.m. – 8 p.m. (ET), Monday through Friday, excluding federal holidays. You can also e-mail your inquiries to CPS/SAIG at CPSSAIG@ed.gov.
Technical References

Technical references are manuals provided to postsecondary schools and third-party servicers. These manuals include record layouts, data entry specifications, import and export formats, and print specifications that you can use to develop your own EDE system or software to interface with EDExpress. The three technical references that are available from the U.S. Department of Education’s Federal Student Aid Download (FSAdownload) Web site, located at fsadownload.ed.gov, are:

- The 2018-2019 EDE Technical Reference, which is a compilation of record layouts, processing codes, and ISIR printing formats provided to assist EDE participants in developing their own software to interface with EDExpress.

- The 2018-2019 Packaging Technical Reference, which is a compilation of record layouts for adding and changing records in the Packaging module of EDExpress.

- The 2018-2019 Common Origination and Disbursement (COD) Technical Reference, which provides processing information and technical specifications for the COD Common Record. Volume III includes record layouts for adding and changing records in EDExpress.
Appendix – Financial Aid Shopping Sheet

Overview

The Financial Aid Shopping Sheet is a consumer tool created by the U.S. Department of Education in collaboration with the Consumer Finance Protection Bureau that is designed to simplify information that students receive about costs and financial aid so they can make informed decisions about which postsecondary institution to attend. The Financial Aid Shopping Sheet is a two-page document that provides students with an easy-to-read projection of basic attendance costs (such as tuition, room and board, etc.) and a forecast of grant and loan eligibility. It also lists basic financial information about your school, such as its graduation rate, repayment rate, and median borrowing.

EDExpress 2018-2019 includes functionality that enables you to set up and print the Financial Aid Shopping Sheet for students at your school. You can customize information printed on the Financial Aid Shopping Sheet, use existing EDExpress student records or create unique records to use as a basis for the document, and print, e-mail, and export Financial Aid Shopping Sheet data.

You do not need to be a regular EDExpress user to take advantage of the Financial Aid Shopping Sheet functionality in EDExpress 2018-2019. After completing basic software setup to define information about your school’s costs, you can manually create and print the Financial Aid Shopping Sheet for your students in the software.

Important Note! The appearance of the Financial Aid Shopping Sheet relies upon graphics that are downloaded from the Internet during the print process. If you do not have an Internet connection during the print process, the document will not appear as intended visually and may lead to student inquiries as a result.

This appendix to the 2018-2019 EDExpress for Windows, Release 1.0 Desk Reference provides guidance on using Global and Packaging functionality in EDExpress 2018-2019 to implement use of the Financial Aid Shopping Sheet at your school.

The following areas are covered in this appendix:

- Financial Aid Shopping Sheet Profile Setup
- Financial Aid Shopping Sheet Record Entry
- Financial Aid Shopping Sheet External Import
- Financial Aid Shopping Sheet Print and Export
- Financial Aid Shopping Sheet External Import Record Layout
- Where to Get More Information

For additional information and guidance regarding Financial Aid Shopping Sheet functionality in EDExpress 2018-2019, see the software’s help text.
Financial Aid Shopping Sheet Profile Setup

The Financial Aid Shopping Sheet generated by EDExpress uses two sets of data to determine what to display on the document—information about your school provided by the National Center for Education Statistics (NCES) and loaded to the EDExpress database, and information you define about your school’s attendance costs in EDExpress Global setup.

You must define at least one Financial Aid Shopping Sheet profile in Global setup in order to generate the Financial Aid Shopping Sheet for your students using EDExpress. Each Financial Aid Shopping Sheet profile is tied to a specific Integrated Postsecondary Education Data System (IPEDS) Unit ID associated with your school or campus and collects specific cost of attendance information that is printed on the document.

While you are only required to create one Financial Aid Shopping Sheet profile to generate the Financial Aid Shopping Sheet, we recommend that you define additional profiles for the different student populations at your school that have varying costs of attendance. For example, you may want to print a different version of the document for undergraduate students than for graduate students, or generate unique documents for each program of study.

Before you begin defining profiles for the Financial Aid Shopping Sheet in EDExpress, we recommend that you gather some basic information about financial costs at your school. This information, which may vary depending on the academic programs you offer, student living arrangements, and other factors, includes the following:

- Tuition and fees
- Housing and meals
- Books and supplies
- Transportation
- Other education costs

By entering values for these data elements as part of a Financial Aid Shopping Sheet profile, you can reduce data entry time later in the process by pre-filling certain document fields with values that apply to a specific student population at your school.

To set up a Financial Aid Shopping Sheet profile:

1. Select Tools, Setup from the menu bar, then choose Global, Financial Aid Shopping Sheet Profile.
2. If this is your first time adding a Shopping Sheet profile, go to Step 3. To add more profiles, click Add.
3. Enter your school or campus IPEDS Unit ID, or click the ellipsis (…) button to the right of the IPEDS Unit ID field and select your ID from the list. You can use the same IPEDS Unit ID on multiple profiles, provided that the Profile Name you enter for each is unique.
Note: If your school was recently assigned an IPEDS Unit ID, your code and associated information provided by NCES may not be available in EDExpress for selection. If this occurs, enter 000000 for the IPEDS Unit ID in your Shopping Sheet profiles. This workaround will allow you to use Financial Aid Shopping Sheet functionality in EDExpress, although some of the document fields will be printed with blank values.

4. Enter or confirm the following additional values to complete your Financial Aid Shopping Sheet profile:

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Profile Name</td>
<td>Enter a name for the Financial Aid Shopping Sheet profile you are creating. This should be a brief, descriptive phrase that easily identifies the applicable student group for the profile.</td>
</tr>
<tr>
<td>Estimated Cost of Attendance</td>
<td>This display-only calculated field indicates the sum total of the values you enter in the Tuition and fees, Housing and meals, Books and supplies, Transportation, and Other education costs fields.</td>
</tr>
<tr>
<td>Tuition and fees</td>
<td>Enter the tuition and fees costs applicable to this shopping sheet profile. Valid values are 000000-999999 and blank.</td>
</tr>
<tr>
<td>Housing and meals</td>
<td>Enter the housing and meals costs applicable to this shopping sheet profile. Valid values are 000000-999999 and blank.</td>
</tr>
<tr>
<td>Books and supplies</td>
<td>Enter the books and supplies costs applicable to this shopping sheet profile. Valid values are 000000-999999 and blank.</td>
</tr>
<tr>
<td>Transportation</td>
<td>Enter the transportation costs applicable to this shopping sheet profile. Valid values are 000000-999999 and blank.</td>
</tr>
<tr>
<td>Other education costs</td>
<td>Enter the amount of additional education costs applicable to this shopping sheet profile. Valid values are 000000-999999 and blank.</td>
</tr>
<tr>
<td>Default</td>
<td>Select the Default checkbox if this is the Financial Aid Shopping Sheet profile you anticipate using with the majority of the students for whom you will create a Financial Aid Shopping Sheet.</td>
</tr>
<tr>
<td>Comments</td>
<td>Enter up to 255 characters of user-defined text associated with this Financial Aid Shopping Sheet profile. This text is printed at the bottom of the first page of the Financial Aid Shopping Sheet.</td>
</tr>
<tr>
<td>2nd Page Comments</td>
<td>Enter up to 255 characters of user-defined text associated with this Financial Aid Shopping Sheet profile. This text is printed on the second page of the Financial Aid Shopping Sheet.</td>
</tr>
</tbody>
</table>

5. Click OK to continue.

6. Click Yes to save.
**Important Notes**

- The second page of the Financial Aid Shopping Sheet document displays a Glossary section defining common financial aid terminology and a second comments section. To define comments text specific to the second page of the document, use the text entry box labeled “2nd Page Comments.” You can enter up to 255 characters of custom text associated with the second page of the Financial Aid Shopping Sheet.

- After a Financial Aid Shopping Sheet profile is assigned to a student record, the profile becomes locked and cannot be modified in Global setup until it is removed from all student records it is assigned to. To resolve this issue, create a new Financial Aid Shopping Sheet profile or, alternatively, modify cost of attendance values or comment text on the student record as needed before saving, printing, or exporting the document.

- If you do not currently use EDExpress, and you only want to use the Financial Aid Shopping Sheet functionality, you should first complete your assumed school and security setup. Review the earlier sections of this desk reference for guidance on completing these setup areas.

- You can use Global Security Groups setup (**Tools, Setup, Global, Security Groups**) in EDExpress to limit the access of specific users to Financial Aid Shopping Sheet functions such as entry or printing. For guidance on defining security groups in EDExpress, see the “Defining Security” section earlier in this desk reference.
Financial Aid Shopping Sheet Record Entry

After defining at least one Financial Aid Shopping Sheet profile in Global setup, you can begin creating the student records in EDExpress that serve as the basis for the Financial Aid Shopping Sheet.

**Note:** One of the goals of the Financial Aid Shopping Sheet is to provide your students with a comprehensive listing of the financial aid package that they can anticipate receiving at your school or institution. Before you begin creating Financial Aid Shopping Sheet records, we recommend you gather as much current information as possible regarding grant, work-study, and loan awards the student may be eligible to receive, including aid from your school and private, state, and federal sources.

Financial Aid Shopping Sheet records can be created in one of two ways: you can create single records manually in the Financial Aid Shopping Sheet dialog box, or you can add or modify multiple student records using external import. For more information on importing Financial Aid Shopping Sheet data from your external system, see the “Financial Aid Shopping Sheet External Import” section later in this appendix.

You can view, create, and modify Financial Aid Shopping Sheet records in the Financial Aid Shopping Sheet dialog box, which is accessible from the Tools menu. You are not required to have an existing student record in EDExpress to create a Financial Aid Shopping Sheet record. However, if you do have an existing EDExpress record for a student, you can select it when creating a Financial Aid Shopping Sheet record to automatically fill certain fields with demographic data.

**To enter a Financial Aid Shopping Sheet record manually:**

1. Select **Tools, Financial Aid Shopping Sheet** from the menu bar.

2. To create a new record, enter the student’s **Original SSN** in the **Create** box and click **New**, or click the **ellipsis (…)** button to the right of the Original SSN field to display a list of students with demographic records. Use the scroll bars to locate the record and click **OK** to select it.

   **Note:** To open an existing Financial Aid Shopping Sheet record, enter the student’s **Original SSN** in the **Open** box and click **Open**, or click the **ellipsis (…)** button to the right of the Original SSN field to display a list of existing Financial Aid Shopping Sheet records. Use the scroll bars to locate the record and click **OK** to select it.

3. Enter the name of the **Shopping Sheet Profile** you want to use for this Financial Aid Shopping Sheet record. You can also click the **ellipsis (…)** button to the right of the Shopping Sheet Profile field to display a list of existing Financial Aid Shopping Sheet profiles in Global setup. Use the scroll bars to locate the profile you want to use, then click **OK** to select it.
4. In the Student Information section, enter the student’s **First Name, Middle Initial, Last Name, Student ID, and E-mail Address**.

   **Note:** If you selected an existing EDExpress student demographic record in step 2, the student’s name and e-mail address fields are filled with values from the student’s Demo tab.

   **Note:** Use the optional Student ID field to provide an identifier for the student that is specific to your school or entity. The Student ID value is not masked on the Financial Aid Shopping Sheet, so use caution if your identifier is based on the student’s Social Security Number.

5. Verify the amounts listed in the **Tuition and fees, Housing and meals, Books and supplies, Transportation, and Other education costs** fields listed in the Costs section of the dialog box are correct and modify as necessary. The values displayed in these five fields default to the amounts you defined in Global setup for the Shopping Sheet profile you selected in step 3. The Estimated Cost of Attendance field displays the calculated sum total of the five Costs section fields.

6. In the Grants and scholarships section, enter values in the **Grants from your school, Federal Pell Grant, Grants from your state, and Other scholarships you can use** fields as appropriate based on the student’s estimated award package. Valid values are 0-999999. The Total Grants and Scholarships field displays the calculated sum total of the four Grants and Scholarships section fields.

   **Note:** The Net Costs field, located below the four Grants and scholarships section fields, is a calculated field that subtracts the Estimated Cost of Attendance field value from the Total Grants and Scholarships field value.

7. In the Loan options section, enter values in the **Federal Perkins Loan, Federal Direct Subsidized Loan, and Federal Direct Unsubsidized Loan** fields as appropriate based on the student’s estimated award package. Valid values are 0-999999.

8. Enter the amount of work-study the student is eligible to receive in the **Work-Study (Federal, state, or institutional)** field. Valid values are 0-999999.

9. Enter the student’s EFC in the **Family Contribution** field. Valid values are 0-999999.

   **Note:** If you selected an existing EDExpress student demographic record in step 2 that has an active ISIR transaction selected on the ISIR Review tab to create a Financial Aid Shopping Sheet record, the Family Contribution field is filled with the EFC from the designated ISIR transaction.

10. Verify the text in both **Comments** text entry boxes and modify as needed. The default text displayed in these boxes is the Comments text you defined in Global setup for the Shopping Sheet profile you selected in step 3.

11. Click **Save** to save the Financial Aid Shopping Sheet record.
12. Select Printer, E-mail, or File to print the document, attach it to an e-mail, or export the Financial Aid Shopping Sheet data to an XML file, respectively. See the “Financial Aid Shopping Sheet Print and Export” section in this appendix for more information regarding these three functions.

13. Return to step 2 and repeat the process for additional Financial Aid Shopping Sheet records you need to create, or click Close to close the dialog box.

**Important Notes**

- If you frequently modify the Tuition and Fees, Books and Supplies, Housing and Meals, Transportation, Other Educational Costs, and Comments field values on individual Financial Aid Shopping Sheet records, consider creating additional Financial Aid Shopping Sheet profile records in Global setup to cover additional scenarios and save yourself future data entry effort. You may also want to update Global setup to designate a different profile that is applicable to more students as the default when creating new records.

- If you are using a Financial Aid Shopping Sheet profile associated with the IPEDS Unit ID 000000, consider adding comments text to the Financial Aid Shopping Sheet that provides contact information or a Web site address where your students can find more information about your school.

- When exporting Financial Aid Shopping Sheet data to an XML file (by clicking the File button on the Financial Aid Shopping Sheet dialog box), the default export file name is the first four characters of the student’s last name and the first four letters of the student’s first name, followed by a file extension of .xml. For example, an export file for John Smith is named smitjohn.xml by default. You can change the file name as needed before running the export. We recommend you add your school name to the export file name in the event that the student receives Financial Aid Shopping Sheet data from multiple schools.
Financial Aid Shopping Sheet External Import

Interfacing your school’s system with EDExpress reduces the effort of preparing Financial Aid Shopping Sheet data by importing student data from your existing systems into EDExpress. You can also take advantage of the built-in edits in EDExpress to ensure that your records contain valid data.

To import Financial Aid Shopping Sheet data from another system into EDExpress, you must format the data according to the record layout listed in the “Financial Aid Shopping Sheet External Add/Change Record Layout” later in this appendix.

You use the same external import record layout to add new Financial Aid Shopping Sheet records or modify existing records in EDExpress. The following two fields are required when adding Financial Aid Shopping Sheet records:

- Student’s Original Social Security Number (SSN)
- Shopping Sheet Profile Name

If more than one record with the same original SSN exists in an external file, only the first record is imported. Duplicate records are skipped automatically unless you select the Prompt for Duplicate checkbox in the import dialog box.

When creating an external import file to modify existing Financial Aid Shopping Sheet records, you only need to include the student’s original SSN and the field values you want to update; if your import file contains a blank value, the corresponding field value in EDExpress, if it exists, is not overwritten to blank upon import.

To modify existing records with your import file, you must select the Prompt for Duplicates checkbox in the Import dialog box. With the prompt for duplicates option selected, EDExpress prompts you for the following actions when it encounters a duplicate record:

- **Skip?** This option skips the current record and the import process advances to read the next record in the file. No updates are made to the current record.

- **Skip All?** This option skips the current record and all other duplicates without notification. No updates are made to any of the duplicate records that are found. EDExpress does not prompt you when it finds duplicates during the process.

- **Update?** This option prompts you to update the current record and continues processing with the next record. The update option processes the current record, then advances to the next record and prompts you again when another duplicate record is found. You should choose this option if your import file has a mix of add and change records and the record indicated is a modification to an existing Financial Aid Shopping Sheet record.
- **Update All?** This option updates the current record and all other duplicate records throughout the process without warning you of duplicate records found. You should choose this option if all the records in your import file are modifications to existing Financial Aid Shopping Sheet records.

**To import a Financial Aid Shopping Sheet external file:**

1. Select **File, Import** from the menu bar, then choose **Global**.
2. Click the down arrow next to the Import Type field and select **Financial Aid Shopping Sheet External Add/Change**.
3. **New for 2018-2019!** You must now indicate whether you are importing a new file or an archived file you imported previously in the Import From section of the import dialog box. After clicking the **New File** or **Archived File** button in the Import From section of the import dialog box, click the **File** button to locate the FAEA19OP file you want to import. If you are importing a new file, EDExpress displays your import data directory (as specified in File Management setup). If you are importing an archived file, EDExpress displays the Import From Archive dialog box, enabling you to search your archived import files for the file you want to re-import.
4. Choose the file destination for the Import Records Edit Report: **Printer, File, or Screen**. If you choose **File**, select the location and type the file name for the report. Remember that if you print to a file, no paper copy is printed on your printer, but you can print this file using word processing software.
   **New for 2018-2019!** You can also apply password protection to your import edit report if you choose **File** by entering a password in the **Password** and **Verify Password** fields. Password-protected import edit reports are stored in encrypted PDF format.
5. Select the **Prompt for Duplicates?** checkbox to identify records that are already in your database during the import. You should select this option if you are modifying existing Financial Aid Shopping Sheet records in your database with your import file.
6. Click **OK** to begin the import. An In Progress dialog box appears.
7. (Optional) If you selected the Prompt for Duplicates? checkbox in step #5 and the import process matches the original SSN of a record in your import file to a Financial Aid Shopping Sheet record in your EDExpress database, a dialog box appears listing the duplicate SSN and the options to **Skip, Skip All, Update, or Update All**.
   Select **Update** or **Update All** if you want to update the Financial Aid Shopping Sheet records with the information in the import file; otherwise, click **Skip** or **Skip All**. Repeat as necessary for subsequent duplicate records identified during the import, depending on the option you select.
8. When the import is complete, the In Progress dialog box displays the number of records accepted or in error, as well as the total number of records identified in the import file.
9. Click **OK** to close the In Progress dialog box.
10. Review the results on the Import Records Edit Report. If errors occurred, correct them in your import file, resave the file, and import the file again.

After you have successfully added or modified your Financial Aid Shopping Sheet records through external import, you can review the imported information on the Financial Aid Shopping Sheet dialog box and proceed with print and export options as needed. See the “Financial Aid Shopping Sheet Print and Export” section in this appendix for more information regarding the print and export functions.

**Important Notes**

- **New for 2018-2019!** The EDExpress import process now archives imported data files automatically, storing the files in a compressed, password-protected ZIP file called Backup#.zip (where # is a number from 0-9 that is incremented each time the previously numbered backup file reaches 2 gigabytes or more in size). Archive files are stored in your default import data directory (as specified in File Management setup) and are accessible from the import dialog box by clicking the **Archived File** button.

- The process of importing Financial Aid Shopping Sheet data from an external system parallels the EDExpress Pell Grant module’s external import process. For more detailed information on the Pell Grant external import process, see Section 1 of the 2018-2019 COD Technical Reference, Volume III, which will be available for download from the FSAdownload Web site in November 2017.

- EDExpress receives data from external systems without a header and trailer record but does require ASCII format, with the end of each record marked with carriage return/line feed characters (ASCII 13 and 10). After the last record there is no end of file marker (EOF), only the final carriage return/line feed marker.

- Each imported Add record undergoes field-by-field editing during the Save process. All records failing edits are listed on the Import Records Edit Report. The report contains a line for each record that has a reject, a warning, or has been skipped, as well as the student’s original SSN, a reject or warning message, and the data field in question (if appropriate).

- You must provide a Shopping Sheet profile name in your import file unless you are updating an existing record.
Financial Aid Shopping Sheet Print and Export

After creating Financial Aid Shopping Sheet records, the final step in the process is to generate the Financial Shopping Sheet document for your students. EDExpress enables you to print single or multiple Financial Aid Shopping Sheet documents, attach the document to an e-mail, and export Financial Aid Shopping Sheet data to an XML file.

To create the Financial Aid Shopping Sheet, EDExpress uses the information you enter or import for the student’s record, as well as the Shopping Sheet profile you associate with the record. Some graphic elements in the document, such as Graduation Rate and Loan Default Rate, are generated dynamically based on NCES information regarding the IPEDS Unit ID you select in the Shopping Sheet profile.

Important Note! The appearance of the Financial Aid Shopping Sheet relies upon graphics that are downloaded from the Internet during the print process. If you do not have an Internet connection during the print process, the document will not appear as intended visually and may lead to student inquiries as a result.

To print, e-mail, or export a Financial Aid Shopping Sheet from an open record:

1. Select Tools, Financial Aid Shopping Sheet from the menu bar.

2. Open an existing Financial Aid Shopping Sheet record or create a new record. See the “Financial Aid Shopping Sheet Record Entry” and “Financial Aid Shopping Sheet External Import” sections earlier in this appendix for guidance on creating records.

3. Click the Printer button to generate a printed version of the Financial Aid Shopping Sheet.

   Click the E-mail button to attach an electronic version of the Financial Aid Shopping Sheet to an e-mail message using the default e-mail software on your PC. The student’s E-mail Address value from the record is automatically used in the “To” line. Note: If the E-mail Address field is blank on the record, you will receive an error message when you try to use this option.

   Click the File button to export the Financial Aid Shopping Sheet data from the student record to an XML file on your PC. You must provide a location on your PC for the file to be saved. All major Financial Aid Shopping Sheet fields and data are included in the export file. You can also apply password protection to your export if you choose File by entering a password in the Password and Verify Password fields. Password-protected export files are stored in encrypted ZIP format.

You can also print single or multiple Financial Aid Shopping Sheet documents from the Global Print menu (File, Print, Global).

Important Notes

- New for 2018-2019! You can now indicate EDExpress reports you print frequently as “favorites” by clicking the star icon to the right of the report type in the Print dialog box. Reports marked as favorites appear automatically in the Favorites section of the EDExpress
desktop, which allows you to access the print functionality for the report more quickly. To remove the designation of a report as a favorite, return to the Print dialog box for the report and click the star icon again. If you want to remove all reports designated as favorites from the EDExpress desktop, go to View, Desktop Settings and click Clear Favorites.

- The Financial Aid Shopping Sheet can be printed to a color or black-and-white printer.
- If you print a Financial Aid Shopping Sheet document to your printer, and the printed page has blank boxes in certain sections, the required graphics files may not have downloaded correctly during the printing process. Check your Internet connection and try printing again.
- The Financial Aid Shopping Sheet is designed to print as a two-page document. If you e-mail the Financial Aid Shopping Sheet to your students from EDExpress as an HTML attachment, we recommend advising them to resize the document before printing to ensure it fits on two pages.
- The street address and Web site information for your school that appears on the Financial Aid Shopping Sheet is derived from NCES information associated with the IPEDS Unit ID you choose for the Financial Aid Shopping Sheet profile you add to the student’s record.
- You can also print the Financial Aid Shopping Sheet simultaneously with award letters you print using the EDExpress Packaging module. You should ensure the award amounts listed on the award letter and Financial Aid Shopping Sheet match before providing both to your students to avoid inquiries about discrepancies. For more information, see the “Print Award Letters” section earlier in this desk reference.
- If you print the Financial Aid Shopping Sheet to a file from the Global Print dialog box, the file is created in HTML format.
### Financial Aid Shopping Sheet External

#### Add/Change Record Layout

<table>
<thead>
<tr>
<th>Field #</th>
<th>Start Position</th>
<th>End Position</th>
<th>Field Length</th>
<th>Field Name</th>
<th>Valid Field Content</th>
<th>Justify</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>1</td>
<td>9</td>
<td>9</td>
<td>Student’s Original Social Security Number</td>
<td>001010001 to 999999999 Must be nine digits. Cannot be blank.</td>
<td>Left</td>
</tr>
<tr>
<td>2</td>
<td>10</td>
<td>25</td>
<td>16</td>
<td>Last Name</td>
<td>Numbers 0-9 Uppercase letters A to Z Space . (period) ’ (apostrophe) - (dash) Can be blank</td>
<td>Left</td>
</tr>
<tr>
<td>3</td>
<td>26</td>
<td>37</td>
<td>12</td>
<td>First Name</td>
<td>Numbers 0-9 Uppercase letters A to Z Space . (period) ’ (apostrophe) - (dash) Can be blank</td>
<td>Left</td>
</tr>
<tr>
<td>4</td>
<td>38</td>
<td>38</td>
<td>1</td>
<td>Middle Initial</td>
<td>Uppercase letters A to Z Can be blank.</td>
<td>Left</td>
</tr>
<tr>
<td>Field #</td>
<td>Start Position</td>
<td>End Position</td>
<td>Field Length</td>
<td>Field Name</td>
<td>Valid Field Content</td>
<td>Justify</td>
</tr>
<tr>
<td>--------</td>
<td>----------------</td>
<td>--------------</td>
<td>--------------</td>
<td>--------------</td>
<td>-------------------------------------------------------------------------------------</td>
<td>---------</td>
</tr>
</tbody>
</table>
| 5      | 39             | 50           | 12           | Student ID  | 0 to 9  
Uppercase A to Z  
! (Exclamation)  
@ (At)  
# (Pound)  
$ (Dollar)  
% (Percent)  
^ (Caret/Power)  
& (Ampersand)  
* (Asterisk/Multiplication)  
( (Open Parenthesis)  
) (Closed Parenthesis)  
- (Negation/Subtraction)  
= (Equal)  
\ (Backward Slash)  
+ (Plus/Addition)  
~ (Tilde)  
: (Colon)  
; (Semi-Colon)  
' (Apostrophe)  
“ (Quotation)  
< (Less than)  
> (Greater than)  
? (Question mark)  
. (Comma)  
. (Period)  
/ (Forward Slash/Division)  
[ (Open Bracket)  
] (Closed Bracket)  
{ (Open Brace)  
} (Closed Brace)  
Can be blank | Left |
<table>
<thead>
<tr>
<th>Field #</th>
<th>Start Position</th>
<th>End Position</th>
<th>Field Length</th>
<th>Field Name</th>
<th>Valid Field Content</th>
<th>Justify</th>
</tr>
</thead>
<tbody>
<tr>
<td>6</td>
<td>51</td>
<td>100</td>
<td>50</td>
<td>Student E-mail Address</td>
<td>Only one “at” sign (@) is allowed.</td>
<td>Left</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Before the “at” sign:</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>• Use at least one valid character</td>
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<td></td>
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<td></td>
<td></td>
<td></td>
<td>• all characters in the range of ASCII 33-126, except for the following thirteen characters: `&lt; &gt; ( ) [ ] \ ; : &quot; @</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>• period cannot be first, last or adjacent to another period.</td>
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<td></td>
<td></td>
<td></td>
<td></td>
<td>After the “at” sign:</td>
<td></td>
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<tr>
<td></td>
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<td></td>
<td></td>
<td></td>
<td>• use at least one valid character</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>• only letters, digits, hyphen, underscore and period (A-Z, a-z, 0-9, _, -, .)</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>• Hyphen, underscore, or period cannot be first, last, or adjacent to a period.</td>
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<td></td>
<td></td>
<td></td>
<td>Can be blank</td>
<td></td>
</tr>
<tr>
<td>7</td>
<td>101</td>
<td>106</td>
<td>6</td>
<td>Grants from your school</td>
<td>Must be numeric</td>
<td>Left</td>
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<td></td>
<td></td>
<td>Valid Values: 000000-999999</td>
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<td></td>
<td>Can be blank</td>
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</tr>
<tr>
<td>8</td>
<td>107</td>
<td>112</td>
<td>6</td>
<td>Federal Pell Grant</td>
<td>Must be numeric</td>
<td>Left</td>
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<td>Valid Values: 000000-999999</td>
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<td></td>
<td></td>
<td></td>
<td>Can be blank</td>
<td></td>
</tr>
<tr>
<td>9</td>
<td>113</td>
<td>118</td>
<td>6</td>
<td>Grants from your state</td>
<td>Must be numeric</td>
<td>Left</td>
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<td>Valid Values: 000000-999999</td>
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<td>Can be blank</td>
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<tr>
<td>10</td>
<td>119</td>
<td>124</td>
<td>6</td>
<td>Other scholarships you can use</td>
<td>Must be numeric</td>
<td>Left</td>
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<td>Field Length</td>
<td>Field Name</td>
<td>Valid Field Content</td>
<td>Justify</td>
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<td>-------------------------------------------------------------------------------------</td>
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</tr>
<tr>
<td>11</td>
<td>125</td>
<td>130</td>
<td>6</td>
<td>Perkins Loans</td>
<td>Must be numeric&lt;br&gt;Valid Values: 000000-999999&lt;br&gt;Can be blank.</td>
<td>Left</td>
</tr>
<tr>
<td>12</td>
<td>131</td>
<td>136</td>
<td>6</td>
<td>Direct Subsidized Loan</td>
<td>Must be numeric&lt;br&gt;Valid Values: 000000-999999&lt;br&gt;Can be blank.</td>
<td>Left</td>
</tr>
<tr>
<td>13</td>
<td>137</td>
<td>142</td>
<td>6</td>
<td>Direct Unsubsidized Loan</td>
<td>Must be numeric&lt;br&gt;Valid Values: 000000-999999&lt;br&gt;Can be blank.</td>
<td>Left</td>
</tr>
<tr>
<td>14</td>
<td>143</td>
<td>148</td>
<td>6</td>
<td>Work-Study</td>
<td>Must be numeric&lt;br&gt;Valid Values: 000000-999999&lt;br&gt;Can be blank.</td>
<td>Left</td>
</tr>
<tr>
<td>15</td>
<td>149</td>
<td>154</td>
<td>6</td>
<td>Family Contribution</td>
<td>Must be numeric&lt;br&gt;Valid Values: 000000-999999&lt;br&gt;Can be blank.</td>
<td>Left</td>
</tr>
<tr>
<td>Field #</td>
<td>Start Position</td>
<td>End Position</td>
<td>Field Length</td>
<td>Field Name</td>
<td>Valid Field Content</td>
<td>Justify</td>
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<td>------------------------------------------------------------------------------------</td>
<td>---------</td>
</tr>
<tr>
<td>16</td>
<td>155</td>
<td>204</td>
<td>50</td>
<td>Shopping Sheet Profile Name</td>
<td>Any valid keyboard character except underscore (_) and pipe (</td>
<td>). See Valid Field Content for Student ID (field #5) for specific valid value list.</td>
</tr>
<tr>
<td></td>
<td></td>
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<td></td>
<td></td>
<td>If adding a new record, field value must correspond to a Financial Aid Shopping Sheet Profile Name value defined in EDExpress Global setup (Tools, Setup, Global, Financial Aid Shopping Sheet).</td>
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<tr>
<td></td>
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<td>Can be blank if updating an existing Financial Aid Shopping Sheet record in EDExpress.</td>
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<td></td>
<td>If EDExpress matches the Financial Aid Shopping Sheet Profile Name in your import file to a value in Global setup, the following fields are filled on the student’s Financial Aid Shopping Sheet record in EDExpress based on the values you provided for the profile in setup if the field data is blank or invalid in the import file:</td>
<td></td>
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<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>• Tuition and fees</td>
<td></td>
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<td></td>
<td></td>
<td></td>
<td>• Housing and meals</td>
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<td></td>
<td>• Books and supplies</td>
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<td></td>
<td></td>
<td>• Transportation</td>
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<td></td>
<td></td>
<td></td>
<td>• Other education costs</td>
<td></td>
</tr>
<tr>
<td>17</td>
<td>205</td>
<td>210</td>
<td>6</td>
<td>Tuition and fees</td>
<td>Must be numeric</td>
<td>Left</td>
</tr>
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<td></td>
<td></td>
<td>Valid Values: 000000-999999</td>
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<td></td>
<td>Can be blank.</td>
<td></td>
</tr>
<tr>
<td>18</td>
<td>211</td>
<td>216</td>
<td>6</td>
<td>Housing and meals</td>
<td>Must be numeric</td>
<td>Left</td>
</tr>
<tr>
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<td>Valid Values: 000000-999999</td>
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<td>Can be blank.</td>
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<tr>
<td>Field #</td>
<td>Start Position</td>
<td>End Position</td>
<td>Field Length</td>
<td>Field Name</td>
<td>Valid Field Content</td>
<td>Justify</td>
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</tr>
</tbody>
</table>
| 19     | 217            | 222          | 6            | Books and supplies          | Must be numeric
Valid Values: 000000-999999
Can be blank.                     | Left    |
| 20     | 223            | 228          | 6            | Transportation              | Must be numeric
Valid Values: 000000-999999
Can be blank.                     | Left    |
| 21     | 229            | 234          | 6            | Other education costs       | Must be numeric
Valid Values: 000000-999999
Can be blank.                     | Left    |
<table>
<thead>
<tr>
<th>Field #</th>
<th>Start Position</th>
<th>End Position</th>
<th>Field Length</th>
<th>Field Name</th>
<th>Valid Field Content</th>
<th>Justify</th>
</tr>
</thead>
<tbody>
<tr>
<td>22</td>
<td>235</td>
<td>489</td>
<td>255</td>
<td>Comments</td>
<td>0 to 9 \n Uppercase A to Z \n ![Exclamation] \n @ (At) \n # (Pound) \n $ (Dollar) \n % (Percent) \n ^ (Caret/Power) \n &amp; (Ampersand) \n * (Asterisk/Multiplication) \n ( (Open Parenthesis) \n ) (Closed Parenthesis) \n - (Negation/Subtraction) \n = (Equal) \n \ (Backward Slash) \n _ (Underscore) \n + (Plus/Addition) \n ~ (Tilde) \n : (Colon) \n ; (Semi-Colon) \n ' (Apostrophe) \n &quot; (Quotation) \n &lt; (Less than) \n &gt; (Greater than) \n ? (Question mark) \n , (Comma) \n . (Period) \n / (Forward Slash/Division) \n [ (Open Bracket) \n ] (Closed Bracket) \n { (Open Brace) \n } (Closed Brace) \n Can be blank</td>
<td>Left</td>
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<td>Field #</td>
<td>Start Position</td>
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<tr>
<td>23</td>
<td>490</td>
<td>744</td>
<td>255</td>
<td>2nd Page Comments</td>
<td>0 to 9</td>
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<td>Uppercase A to Z</td>
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<td>! (Exclamation)</td>
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<td>@ (At)</td>
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<td>^ (Caret/Power)</td>
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<td>* (Asterisk/Multiplication)</td>
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<td>- (Negation/Subtraction)</td>
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<td>_ (Underscore)</td>
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<td>: (Colon)</td>
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<td>; (Semi-Colon)</td>
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<td>‘ (Apostrophe)</td>
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<td>“ (Quotation)</td>
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<td>&lt; (Less than)</td>
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<td>&gt; (Greater than)</td>
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<td>? (Question mark)</td>
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<td>. (Period)</td>
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<td>/ (Forward Slash/Division)</td>
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<td>{ (Open Brace)</td>
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Where to Get More Information


- Dear Colleague Letter GEN-12-12, posted on July 25, 2012 to the IFAP Web site.


- EDExpress for Windows 2018-2019 Online Help. For basic guidance and information on using the EDExpress software, select Help, Help Topics from the EDExpress menu bar. You can view the main list of EDExpress help topics by module on the Contents tab or scroll through available help topics on the Index tab.

- For technical support for EDExpress, call CPS/SAIG Technical Support at 800/330-5947 (TDD/TTY 800/511-5806), 8 a.m. to 8 p.m. ET, Monday through Friday, excluding federal holidays. You can also e-mail your inquiries to CPS/SAIG at CPSSAIG@ed.gov.

- For policy questions related to the use of the Financial Aid Shopping Sheet, send an e-mail to ShoppingSheet@ed.gov.